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ABSTRACT

This document provides a framework for a broad-based secondary and postsecondary curriculum to prepare students for employment in marketing management and research (MMR). The first part of the technical competency profile (TCP) contains the following items: an explanation of the purpose and scope of Ohio's TCPs; college tech prep program standards; an overview of the scope and purpose of tech prep; a key to the profile codes; lists of the skills and sample occupations in the MMR field; a MMR overview chart; and a list of the MMR instructional units. The remainder of the TCP details the competencies and key indicators addressed in the Ohio MMR program's 21 units, which cover the following topics: professional development and networking; professional effectiveness; marketing basics; marketing and business management; marketing planning; marketing information management; project management; marketing research; pricing; promotion; product and service management; branding; selling; distribution and logistics; customer relationship management; finance; marketing and the new economy; business law and ethics affecting marketing; technology for marketing; writing for marketing; and knowledge management. The following items are appended: a list of review panel members; the college tech prep pathway template; a list of professional associations and certificates; and a map of Ohio tech prep consortia. (MN)

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Ohio Marketing Management and Research

Technical Competency Profile (TCP)

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Ohio Marketing Management and Research

Technical Competency Profile (TCP)

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2003

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Introduction

Technical Competency Profiles (TCP) are collaboratively developed by the Ohio Board of Regents and the Ohio Department of Education, Career-Technical and Adult Education, and the Center on Education and Training for Employment at The Ohio State University. The profile provides a framework for a broad-based secondary and post-secondary curriculum.

The profile includes essential competencies for programs from secondary through post-secondary associate degree programs. Each area contains competencies common to each of the occupations within a career cluster and competencies specific to an occupation. This profile design reflects programming flexibility that represents many options for educational studies and career planning.

Representatives from a broad spectrum of Ohio professionals played a critical role in defining the vision and scope of the TCP and in defining the essential and recommended skills for current and future employees. Secondary and post-secondary educators representing Ohio schools and colleges leveled the competencies to create career pathways from secondary to associate degree programs. A list of business and industry representatives and educators participating in the development of the profile appears in Appendix A.

Technical Competency Profiles (TCP) are used as the basis for the development of an integrated delivery system that provides opportunities for new and challenging programs and courses. Career-Technical Education, College Tech Prep, and post-secondary degree programs will be enhanced and expanded through the use of the Technical Competency Profile (TCP).

The profiles are available on the Internet at www.ohtpcs.org. At this location users can download copies of the entire profile or conduct searches on a number of key variables.

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College Tech Prep Program Standards

College Tech Prep programs are rigorous programs of study starting at the secondary school level and continuing through the associate degree and beyond. In accordance with the Carl D. Perkins Vocational Technical Education Enhancement Act of 1998, College Tech Prep programs are seamless, non-duplicative programs of study combining high-level academic and technical preparation in a variety of career fields.

The Carl D. Perkins Vocational and Technical Education Act of 1998 defines College Tech Prep as:

> *A program that provides technical preparation in a career field such as engineering, applied science, a mechanical, industrial or practical arts or trade, agriculture, health occupations, business or applied economics and must do the following:*
> - *Combines at least two years of secondary and two years of post-secondary education in a sequential course of study without duplication of coursework*
> - *Integrates academic, vocational and technical education, and if appropriate and available, work-based learning*
> - *Provides technical preparation for careers*
> - *Leads to an associate or a baccalaureate degree or post-secondary certificate in a specific career field*
> - *Leads to placement in appropriate employment or further education.*

The Ohio College Tech Prep Advisory Council recommended to the Ohio Board of Regents and the Ohio Department of Education the following standards for all College Tech Prep programs:

1. Academics are taught at a college-preparatory level and are aligned with state models and academic content standards.
2. In addition to Ohio graduation requirements specified in SB 55, required academic components for College Tech Prep programs include:
    a. Mathematics taught at a minimum level of Algebra II by the completion of high school.
    b. An integrated or stand alone senior-year math component
    c. Three units of science including at least two lab-based science courses
3. College Tech Prep programs will use a state-developed Technical Competency Profile (TCP) as the basis for pathway development. The pathway document should reflect secondary and post-secondary course work and should be made available for stakeholders. All secondary and post-secondary TCP competencies must be clearly identified and addressed. The TCP is the framework used to develop all associated curricular documents; however, components from other competency profiles such as OCAP's (*Occupational Competency Analysis Profile*), ITAC's *(Integrated Technical and Academic Competencies)* and SCANS (*The Secretary's Commission on Achieving Necessary Skills—America 2000*) may be included and are not mutually excluded from a TCP.
4. Articulated pathways will be reviewed every two-years at the consortia level.
5. Pathways operate under an articulation agreement between/among partners in a consortium.
6. College Tech Prep programs at the secondary level will operate as state-approved, career-technical education programs.
7. Academic and technical instruction is integrated and delivered in a contextual approach where possible.
8. Programs have common representation from secondary education, higher education, business, and labor members.
9. Post-secondary programs contain advanced skills in the TCP document.
10. Programs must operate under either regionally accredited post-secondary institutions/degrees or approved apprenticeship programs meeting U.S. Department of Labor standards.
11. College Tech Prep programs, secondary and post-secondary, must comply with the state College Tech Prep Advisory Council's performance measures.

State College Tech Prep Advisory Council
Revised and Approved: May 1, 2002

College Tech Prep

College Tech Prep is a high school and college career path linked to business, industry, and labor that insures a specified seamless pathway from high school to college to careers, meeting Ohio's technological employment needs.

A College Tech Prep student is enrolled in a state-approved College Tech Prep education program. A College Tech Prep Program means a program of study that:

- Combines, at a minimum, two years of secondary education (as determined by Ohio definitions) with a minimum of two years of post-secondary education in a non-duplicative, sequential course of study.
- Integrates academic and technical instruction and utilizes work-based and work-site learning, where appropriate and available.
- Provides technical preparation in a career field such as engineering technology; applied science; mechanical; industrial or practical arts or trades; agriculture; health occupations; business; or applied economics.
- Builds student competencies in mathematics, science, reading, writing, communications, economics, and workplace skills through applied, contextual academics, and integrated instruction, in a coherent sequence of courses.
- Leads to an associate or baccalaureate degree, or a BAT (Bureau of Apprenticeship Training) apprenticeship requiring a minimum of two years in a specific career field.
- Leads to placement in related employment, or to further education.

Key to Profile Codes

Importance of Competencies

All of the competencies in this document represent the minimum requirements for a College Tech Prep program. It is the responsibility of the local consortia to further define and/or expand, as needed, the key indicators for each competency. Each competency must be taught at the Proficient level (P) by the completion of the College Tech Prep program, which is an Associate Degree (AD). A minimal number of competencies have been identified as Introduce (I) at the Associate Degree level. These may require further higher education.

This document integrates college prep level academics with technical skill. Technical skills are a required component.

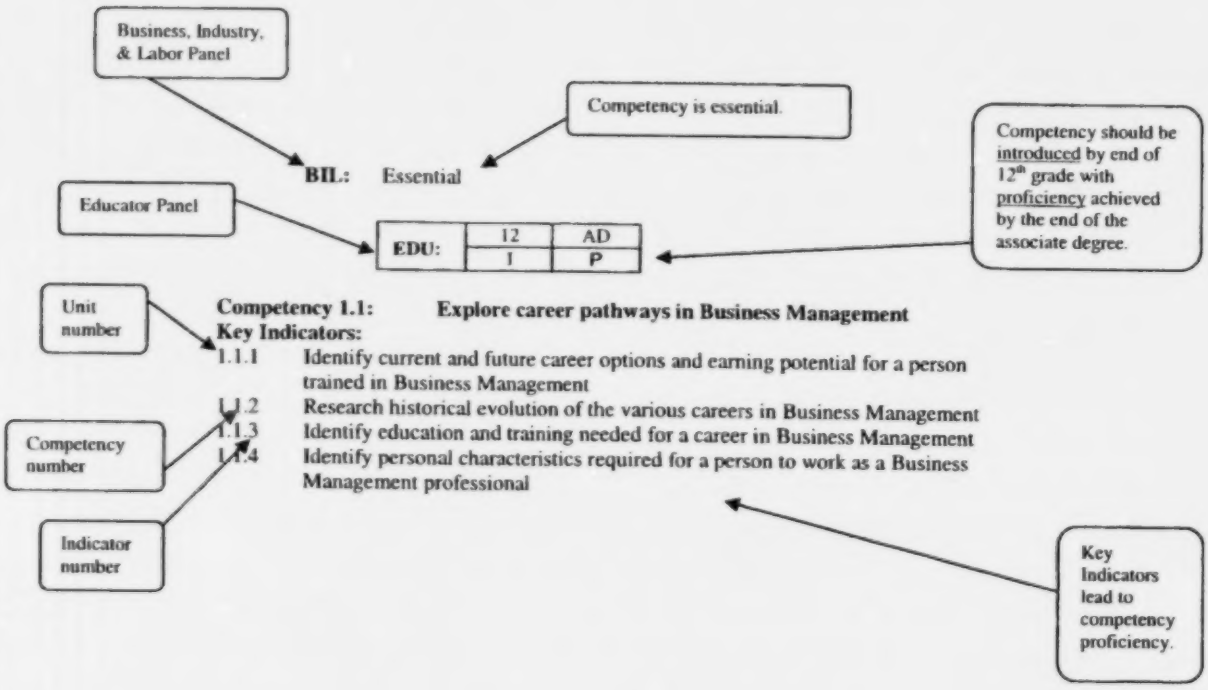
- **I =** **Introduce** (Learner will demonstrate knowledge and comprehension of the competency.)
- **P =** **Proficient** (Learner will demonstrate ability to apply knowledge of and/or perform the competency.)
- **R =** **Reinforced** (Competencies marked proficient at the secondary level are to be reinforced at the associate degree level.)

Grade Level: **12** = by the end of grade 12
AD = by the end of the Associate Degree

ACADEMIC CONNECTION

All College Tech Prep programs are responsible for meeting the academic content standards.

EXAMPLE:


Business, Industry, & Labor Panel
Competency is essential.
BIL: Essential
Educator Panel
EDU: 12 AD
I P
Competency should be introduced by end of 12th grade with proficiency achieved by the end of the associate degree.
Unit number
Competency 1.1: Explore career pathways in Business Management
Key Indicators:
1.1.1 Identify current and future career options and earning potential for a person trained in Business Management
1.1.2 Research historical evolution of the various careers in Business Management
1.1.3 Identify education and training needed for a career in Business Management
1.1.4 Identify personal characteristics required for a person to work as a Business Management professional
Competency number
Indicator number
Key Indicators lead to competency proficiency.

Marketing Management & Research

The American Marketing Association (AMA) defines marketing as the process of planning and executing conception, pricing, promotion and distribution of ideas, goods, and services to create exchanges that satisfy individual and organizational objectives. Marketing is a process that involves a variety of activities designed to change behaviors or influence ideas. These activities include, but are not limited to advertising, logistics, marketing research, product design, and selling.

Marketing must be viewed as a multi-faceted, critical business function that is undergirded by such social sciences as economics, psychology, and sociology. Its successful performance depends on the application of communication skills, use of scientific problem solving, and application of technology to marketing situations and problems. In this century, economic survival in business will depend on the ability to understand and execute marketing skills.

Sample Occupations

Market Researcher
Product/Brand Manager
Product Line Development Manager
Testing Service Manager
Market Development Director
Marketing Coordinator
Promotion Coordinator
Industrial Designs Marketing Director
Strategic Development Director
Vice President – Relations Manager
Project Coordinator
Client Management Specialist
Marketing Specialist
Mystery Shopper
Account Representative
Buyer
Community Outreach Specialist
Interviewer
Coder
Focus Group Moderator
Statistician
Computer Assisted Telephone Interviewer (CATI)
Customer Service Representative
Sales Support
Sales Representative
Public Relations Specialist

2003 MARKETING MANAGEMENT AND RESEARCH COMPETENCY CHART

NOTE: Instruction in the Marketing Management and Research competency profile is coded: I = Introductory; P = Proficient; R = Reinforce.

INSTRUCTIONAL UNIT	COMPETENCY	PROFICIENT HS	PROFICIENT AD
1	**Professional Development and Networking**		
	1.1 Explore career pathways in marketing management and research	P	R
	1.2 Explore professional development opportunities for a marketing manager or research professional	I	P
	1.3 Utilize professional marketing/research resource materials	P	R
	1.4 Prepare for career advancement in marketing and research	P	R
2	**Professional Effectiveness**		
	2.1 Explain professional responsibilities in marketing	P	R
	2.2 Function as a self-managed marketing/research employee	P	R
	2.3 Apply appropriate work ethics as they apply to marketing and research	P	R
	2.4 Apply problem-solving techniques	P	R
	2.5 Manage stressful situations	P	R
	2.6 Build professional network	P	R
	2.7 Achieve organizational goals	P	R
	2.8 Participate in the organization's community outreach involvement	P	R
3	**Marketing Basics**		
	3.1 Analyze marketing and its role in business	P	R
	3.2 Analyze the role of marketing	P	R
	3.3 Evaluate marketing mix components	P	R
4	**Marketing and Business Management**		
	4.1 Characterize the nature of business	P	R
	4.2 Describe management concepts	P	R
	4.3 Develop interpersonal skills with individuals and teams	P	R
	4.4 Manage human resources	I	P
	4.5 Perform marketing personnel staffing functions	I	P
	4.6 Provide leadership to marketing employees	I	P

INSTRUCTIONAL UNIT	COMPETENCY	PROFICIENT HS	PROFICIENT AD
	4.7 Use controlling functions in managing marketing	I	P
	4.8 Establish criteria for purchasing products/services	I	P
	4.9 Analyze general business risk issues	P	R
	4.10 Manage business risks	P	R
	4.11 Analyze safety risks	P	R
	4.12 Follow business regulations	I	P
	4.13 Examine entrepreneurship	I	P
5	**Marketing Planning**		
	5.1 Explain the role of marketing management	P	R
	5.2 Explain nature of marketing plans	P	R
	5.3 Analyze influence of external factors on marketing planning	I	P
	5.4 Identify considerations in implementing international marketing strategies	P	R
	5.5 Describe concepts of market and market identification	P	R
	5.6 Select target market	P	R
	5.7 Explain role of SWOT (Strengths, Weaknesses, Opportunities, Threats) in marketing-planning process	P	R
	5.8 Conduct SWOT analysis for use in marketing planning process	I	P
	5.9 Align marketing objectives/strategies with the company's strategic plan	I	P
	5.10 Develop a marketing plan	P	R
	5.11 Use measures to control marketing planning	I	P
	5.12 Evaluate performance of marketing plan	I	P
	5.13 Conduct marketing audits	I	R
6	**Marketing Information Management**		
	6.1 Explain nature and scope of marketing information management function	P	R
	6.2 Demonstrate components of a marketing-information management system	P	R
	6.3 Explain use of databases in organizing marketing data	P	R
	6.4 Manipulate a database for retrieval of information	I	P
	6.5 Use database information analysis	P	P
	6.6 Write marketing reports	I	R
	6.7 Present report findings and recommendations	P	R
	6.8 Explain nature of forecasts	I	P

INSTRUCTIONAL UNIT	COMPETENCY	PROFICIENT HS	PROFICIENT AD
	6.9 Forecast sales	I	P
7	**Project Management**		
	7.1 Coordinate the diverse components of a project	I	P
	7.2 Manage a project	I	P
	7.3 Explain quality	P	R
	7.4 Manage quality project information	I	P
	7.5 Control project risk		I
8	**Marketing Research**		
	8.1 Describe marketing research activities	P	R
	8.2 Plan a research project	P	R
	8.3 Identify ethical issues in marketing research	P	R
	8.4 Design a marketing research study	I	P
	8.5 Use data collection methods	I	P
	8.6 Describe fundamentals of sampling	I	P
	8.7 Evaluate concepts of measurement and measurement scales	P	R
	8.8 Design measurement instruments	I	P
	8.9 Describe/conduct data collection	I	P
	8.10 Perform data analysis	I	P
	8.11 Evaluate hypothesis testing	I	P
	8.12 Use measures of association, regression analysis, and variance		I
	8.13 Evaluate strategic marketing studies	I	P
	8.14 Describe concept and product testing	I	P
	8.15 Describe characteristics of a name and package testing study	I	P
	8.16 Describe advertising research	I	P
	8.17 Interpret test market studies		I
	8.18 Use online market research tools	I	P
	8.19 Develop marketing research projects	I	P
	8.20 Present research to management	P	R
9	**Pricing**		
	9.1 Evaluate pricing fundamentals	P	R
	9.2 Describe pricing strategies	P	R

INSTRUCTIONAL UNIT	COMPETENCY	PROFICIENT HS	PROFICIENT AD
	9.3 Evaluate pricing techniques	I	P
	9.4 Determine prices	I	P
10	**Promotion**		
	10.1 Analyze promotion fundamentals	P	R
	10.2 Explain communication process used in promotion	P	R
	10.3 Describe promotion laws and regulations	P	R
	10.4 Analyze advertising	P	R
	10.5 Describe advertising outsourcing	I	P
	10.6 Determine cost of advertising media	P	R
	10.7 Evaluate Internet advertising	I	P
	10.8 Evaluate print advertising campaigns	I	P
	10.9 Design television advertising	I	P
	10.10 Design radio advertising	I	P
	10.11 Develop publicity and public relations activities	P	R
	10.12 Develop sales promotion activities	P	R
	10.13 Analyze affiliate marketing and co-branding strategies	I	P
	10.14 Coordinate activities in promotional mix	P	R
	10.15 Manage website	I	P
	10.16 Design frequency-marketing program	I	P
	10.17 Develop co-op advertising	I	P
	10.18 Develop a promotional plan	P	R
11	**Product and Service Management**		
	11.1 Describe factors involved in product/service operations	P	R
	11.2 Plan product/service management strategies	P	R
	11.3 Analyze service-planning issues	P	R
	11.4 Develop new products/services	I	P
	11.5 Evaluate positioning	P	R
	11.6 Explain packaging principles	P	R
12	**Branding**		
	12.1 Evaluate branding concepts	P	R
	12.2 Build brand identity	P	R

INSTRUCTIONAL UNIT	COMPETENCY	PROFICIENT HS	PROFICIENT AD
13	**Selling**		
	13.1 Manage the selling function	P	R
	13.2 Analyze organizational purchase processes	P	R
	13.3 Integrate website into traditional sales and customer service process	I	P
	13.4 Explain role of customer service as a component of selling relationships	P	R
	13.5 Analyze product information to identify product features, advantages, and benefits (FABs)	P	R
	13.6 Develop company-selling policies	P	R
	13.7 Describe nature of selling regulations	P	R
	13.8 Explain selling process	P	R
	13.9 Prepare sales presentation	P	R
	13.10 Establish relations with client/customer	P	R
	13.11 Determine customer needs	P	R
	13.12 Use selling process/techniques	P	R
	13.13 Use support activities	P	R
	13.14 Manage selling activities	I	P
14	**Distribution and Logistics**		
	14.1 Analyze physical distribution strategies	P	R
	14.2 Evaluate concept of Supply Chain Management (SCM)	I	P
	14.3 Evaluate shipping process	P	R
	14.4 Evaluate business inventory	P	R
	14.5 Explain legal considerations in distribution	P	R
	14.6 Describe ethical considerations in distribution	P	R
	14.7 Explain the relationship between customer service and distribution	P	R
	14.8 Prepare invoices	P	R
	14.9 Use an information system for order fulfillment	I	P
	14.10 Describe the receiving process	P	R
	14.11 Coordinate management of distribution	I	P
	14.12 Explain storage considerations	P	R
	14.13 Explain the nature of warehousing	I	P
	14.14 Analyze channel-member relationships	I	P

INSTRUCTIONAL UNIT	COMPETENCY	PROFICIENT HS	PROFICIENT AD
	14.15 Analyze channel strategies	P	R
	14.16 Evaluate channel members	P	R
15	**Customer Relationship Management**		
	15.1 Analyze basic customer relationship management (CRM) concepts	P	R
	15.2 Manage customer service	P	R
	15.3 Explain the benefits of customer support (including online)	P	R
	15.4 Analyze customer relationships	I	P
	15.5 Evaluate customer retention	I	P
16	**Finance**		
	16.1 Explain the nature and scope of financing	P	R
	16.2 Explain basic accounting concepts and principles	P	R
	16.3 Analyze financial performance	P	R
	16.4 Explain purpose and importance of obtaining business credit	P	R
	16.5 Identify risks associated with obtaining business credit	I	P
	16.6 Determine financing needed	I	P
	16.7 Use financial statements to make marketing management and research decisions	I	P
17	**Marketing and the New Economy**		
	17.1 Describe economic concepts	P	R
	17.2 Describe economic indicators and trends	P	R
	17.3 Explain international trade	P	P
18	**Business Law and Ethics Affecting Marketing**		
	18.1 Evaluate the relationship between law and business	I	P
	18.2 Evaluate issues related to leadership and marketing managerial ethics	P	R
	18.3 Demonstrate ethical business behavior in marketing	P	R
	18.4 Evaluate issues related to employee ethics	P	R
	18.5 Describe intellectual property rights and copyright laws	P	R
19	**Technology for Marketing**		
	19.1 Describe the impact of technology on society	P	R
	19.2 Describe types of business software	P	R
	19.3 Use technology applications	P	R

INSTRUCTIONAL UNIT	COMPETENCY	PROFICIENT HS	PROFICIENT AD
	19.4 Access the Internet	P	R
	19.5 Utilize Internet services	P	R
	19.6 Analyze e-commerce concepts	P	R
	19.7 Analyze information from technology sources	P	R
	19.8 Evaluate policies for managing privacy and ethical issues	P	R
	19.9 Assess/explain the technology components of major marketing functions and their interrelationships	P	R
	19.10 Explain impact of technology on marketing	P	R
20	**Writing for Marketing**		
	20.1 Assess report-writing requirements	P	R
	20.2 Write reports	P	R
	20.3 Perform writing to sell	P	R
21	**Knowledge-Management**		
	21.1 Explore knowledge-management	I	I
	21.2 Analyze importance of capture and transfer of strategic knowledge	I	I
	21.3 Analyze organizational culture and the role of knowledge management	I	I
	21.4 Determine barriers that affect knowledge-management implementation	I	I
	21.5 Evaluate various knowledge-management measurement approaches	I	I
	21.6 Measure intellectual capital	I	I

Marketing Management and Research TCP

Marketing Management and Research Instructional Units

1. Professional Development and Networking
2. Professional Effectiveness
3. Marketing Basics
4. Marketing/Business Management
5. Marketing Planning
6. Marketing Information Management
7. Project Management
8. Marketing Research
9. Pricing
10. Promotion
11. Product/Service Management
12. Branding
13. Selling
14. Distribution/Logistics
15. Customer Relationship Management
16. Financing
17. Marketing and the New Economy
18. Business Law and Ethics Affecting Marketing
19. Technology for Marketing
20. Writing for Marketing
21. Knowledge Management

Marketing Management and Research TCP

Instructional Unit 1: Professional Development and Networking

BIL: Essential

EDU:	12	AD
	P	R

Competency 1.1: Explore career pathways in marketing management and research

Key Indicators:

1.1.1 Identify current and future career options for a person trained in marketing management and research

1.1.2 Research the historical evolution of the various careers in marketing management and research

1.1.3 Identify education and training needed for a career in marketing management and research

1.1.4 Identify personal characteristics required for a person to work as a marketing management professional or a marketing researcher

BIL: Essential

EDU:	12	AD
	I	P

Competency 1.2: Explore professional development opportunities for a marketing manager or research professional

Key Indicators:

1.2.1 Research continuing education courses or programs available to enhance skills, to remain current in the profession, and for career advancement

1.2.2 Describe various certifications for marketing management and research professionals (e.g., Certified Marketing Executive, Certified Sales Executive, Certified Professional Manager)

1.2.3 Identify professional associations opportunities for marketing/research professionals (e.g., American Marketing Association [AMA], Marketing Research Association [MRA], Sales and Marketing Executives International [SMEI])

1.2.4 Identify professional journals for marketing/research professionals

1.2.5 Build internal/external marketing/research mentor relationships

1.2.6 Use websites for professional development

1.2.7 Identify marketing networking opportunities internally and externally
1.2.8 Interact with other marketing professionals
1.2.9 Establish professional marketing/research relationships

BIL: Essential

EDU:	12	AD
	P	R

Competency 1.3: Utilize professional marketing/research resource materials
Key Indicators:
1.3.1 Determine resources to maintain professional marketing/research skills
1.3.2 Identify marketing/research publications (e.g., books, periodicals, newsletters)
1.3.3 Discriminate among types of information (e.g., essential, important, critical, nice to know)
1.3.4 Determine validity and reliability of marketing/research resources
1.3.5 Utilize reading skills according to information needs (e.g., skim, comprehend, analyze)
1.3.6 Maintain resource files

BIL: Essential

EDU:	12	AD
	P	R

Competency 1.4: Prepare for career advancement in marketing and research
Key Indicators
1.4.1 Identify advancement opportunities in marketing/research (e.g., internally and externally)
1.4.2 Keep up-to-date on changes in the marketing/research profession
1.4.3 Identify skills needed for advancement
1.4.4 Develop plan for achieving needed skills
1.4.5 Enhance effective interview skills
1.4.6 Write employment-related correspondence and document
1.4.7 Maintain résumé
1.4.8 Complete job applications

Instructional Unit 2: Professional Effectiveness

BIL: Essential

EDU:	12	AD
	P	R

Competency 2.1: Explain professional responsibilities in marketing
Key Indicators:
2.1.1 Explain the need for professional and ethical standards
2.1.2 Explain the responsibility of the individual to apply ethical standards
2.1.3 Explain consequences of unprofessional and/or unethical behavior
2.1.4 Explain importance of conflict resolution in the work environment
2.1.5 Explain legal ramifications of breaching rules and regulations
2.1.6 Explain effects of unethical and/or unlawful behavior

BIL: Essential

EDU:	12	AD
	P	R

Competency 2.2: Function as a self-managed marketing/research employee
Key Indicators:
2.2.1 Propose marketing project
2.2.2 Organize tasks
2.2.3 Manage time
2.2.4 Meet deadlines
2.2.5 Maintain business records
2.2.6 Make long-term and short-term plans
2.2.7 Evaluate progress
2.2.8 Report progress
2.2.9 Acquire appropriate licenses/registrations/credentials

BIL: Essential

EDU:	12	AD
	P	R

Competency 2.3: Apply appropriate work ethics as they apply to marketing and research

Key Indicators:

2.3.1 Adhere to company and/or governmental policies, procedures, rules, and regulations
2.3.2 Exercise confidentiality
2.3.3 Adhere to rules of conduct
2.3.4 Accept constructive criticism
2.3.5 Offer constructive criticism
2.3.6 Exhibit pride in work
2.3.7 Resolve conflict
2.3.8 Avoid harassment
2.3.9 Adjust to changes in the work environment
2.3.10 Demonstrate punctuality
2.3.11 Assume responsibility for decisions and actions
2.3.12 Take responsibility for assignments
2.3.13 Follow chain-of-command
2.3.14 Identify factors that influence work ethic
2.3.15 Describe how personal values are reflected in work ethic
2.3.16 Describe how interactions in the workplace affect personal work ethic
2.3.17 Describe how life changes affect personal work ethic

BIL: Essential

EDU:	12	AD
	P	R

Competency 2.4: Apply problem-solving techniques

Key Indicators:

2.4.1 Identify problem
2.4.2 Select appropriate problem solving tools/techniques
2.4.3 Identify causes of underlying problem
2.4.4 Identify appropriate solutions and consequences (e.g., long term, short term, crisis)
2.4.5 Use resources to explore possible solutions to problem
2.4.6 Contrast advantages and disadvantages of each solution
2.4.7 Identify appropriate action
2.4.8 Evaluate results
2.4.9 Identify post-preventive action

BIL: Essential

EDU:	12	AD
	P	R

Competency 2.5: Manage stressful situations
Key Indicators:
2.5.1 Identify factors contributing to stress
2.5.2 Describe physical and emotional responses to stress
2.5.3 Evaluate positive and negative effects of stress on productivity
2.5.4 Identify strategies and/or methods to reduce/channel stress
2.5.5 Implement strategies to manage stress
2.5.6 Create strategies for developing and maintaining support systems

BIL: Essential

EDU:	12	AD
	P	R

Competency 2.6: Build professional network
Key Indicators:
2.6.1 Identify networking opportunities internally and externally
2.6.2 Develop effective conversation and oral communication skills
2.6.3 Demonstrate self-esteem and self-confidence
2.6.4 Interact with other professionals
2.6.5 Establish relationships
2.6.6 Describe effective listening
2.6.7 Identify barriers to effective listening
2.6.8 Practice listening skills

BIL: Essential

EDU:	12	AD
	P	R

Competency 2.7: Achieve organizational goals
Key Indicators:
2.7.1 Evaluate personal goals in relation to organizational/marketing department goals
2.7.2 Monitor progress by evaluating feedback
2.7.3 List responsibilities in relation to organizational/marketing department goals
2.7.4 Accomplish assigned tasks
2.7.5 Exercise responsibility in relation to organizational/marketing goals
2.7.6 Set appropriate performance standards

2.7.7 Communicate goals with supervisor/peers
2.7.8 Demonstrate knowledge of products and services
2.7.9 Promote organizational/marketing department image and mission

BIL: Essential

EDU:	12	AD
	P	R

Competency 2.8: Participate in an organization's community outreach involvement
Key Indicators:
2.8.1 Propose educational, environmental, and community needs and social issues for organizational involvement
2.8.2 Select issues on which to focus organizational support
2.8.3 Participate in social and/or outreach activities
2.8.4 Encourage staff involvement
2.8.5 Recognize importance of an organization's social and community relationships and their effects on the organization

Instructional Unit 3: Marketing Basics

BIL: Essential

EDU:	12	AD
	P	R

Competency 3.1: Analyze marketing and its role in business
Key Indicators:

3.1.1 Explain marketing concept and its role in business
3.1.2 Profile types of information used by marketing managers
3.1.3 Identify the ways in which organizational functions and marketing are interdependent
3.1.4 Identify types of communication channels (e.g., formal, informal)
3.1.5 Define marketing stakeholder relationships (e.g., customers, employees, shareholders, suppliers)
3.1.6 Explain importance of business/marketing partnerships and relationships
3.1.7 Describe current marketing trends

BIL: Essential

EDU:	12	AD
	P	R

Competency 3.2: Analyze the role of marketing
Key Indicators:

3.2.1 Identify primary functions of marketing
3.2.2 Describe differences between products and services
3.2.3 Quantify values that marketing adds to a product or service
3.2.4 Discuss applicability of marketing beyond products and services
3.2.5 Explain concept of market and market identification
3.2.6 Describe evolution of the marketing concept
3.2.7 Explain the importance of marketing in a global economy
3.2.8 Describe wide scope of marketing (e.g., business-to-customer, business-to-business, industrial, nonprofit, electronic)
3.2.9 Describe differences between transactional marketing and relationship marketing
3.2.10 Define the marketing departments' relationship to other departments
3.2.11 Compare various ways a marketing department can be organized

BIL: Essential

EDU:	12	AD
	P	R

Competency 3.3: Evaluate marketing mix components

Key Indicators:

3.3.1 Define marketing mix
3.3.2 Evaluate the importance of product/service decisions in the marketing mix
3.3.3 Evaluate the importance of distribution and supply chain management
3.3.4 Evaluate the importance of promotion
3.3.5 Evaluate the importance of pricing

Instructional Unit 4: Marketing and Business Management

BIL: Essential

EDU:	12	AD
	P	R

Competency 4.1: Characterize the nature of business
Key Indicators:

4.1.1 Identify types of business organizations and functions (e.g., outsourcing, partnerships, alliances)
4.1.2 Identify business reporting and information flow
4.1.3 Identify ways in which organizational functions are interdependent
4.1.4 Determine how business activities interface with data management functions
4.1.5 Define stakeholder relationships (e.g., customer, employee, shareholder, suppliers)
4.1.6 Identify generally accepted business ethics
4.1.7 Explain importance of business partnerships and relationships
4.1.8 Describe current business trends

BIL: Essential

EDU:	12	AD
	P	R

Competency 4.2: Describe management concepts
Key Indicators:

4.2.1 Identify the major functions and activities of management
4.2.2 Describe management styles
4.2.3 Explain the role of authority, accountability, and responsibility in task accomplishment
4.2.4 Describe current and emerging management trends
4.2.5 Explain importance of strategic planning
4.2.6 Identify the risks/rewards associated with on-line business
4.2.7 Describe methods to manage risks
4.2.8 Describe continuous improvement programs

BIL: Essential

EDU:	12	AD
	P	R

Competency 4.3: Develop interpersonal skills with individuals and teams
Key Indicators:
4.3.1 Analyze interdependence of empathetic listening, synergy, and consensus building
4.3.2 Identify types of decision-making processes
4.3.3 Apply knowledge of group dynamics
4.3.4 Promote teamwork, leadership, and empowerment
4.3.5 Identify strategies for fostering creativity
4.3.6 Recognize effect of influence, power, culture and politics on communication
4.3.7 Use negotiation techniques
4.3.8 Identify phases of team building (e.g., forming, storming, norming, performing)

BIL: Essential

EDU:	12	AD
	I	P

Competency 4.4: Manage human resources
Key Indicators:
4.4.1 Describe ethics in personnel issues
4.4.2 Plan/organize the work efforts of others
4.4.3 Delegate responsibility
4.4.4 Explain job performance to an employee
4.4.5 Establish goals based on standards
4.4.6 Develop job descriptions
4.4.7 Follow personnel/human resource policies
4.4.8 Recognize chain of command
4.4.9 Manage an employee performance development/improvement plan

BIL: Essential

EDU:	12	AD
	I	P

Competency 4.5: Perform marketing personnel staffing functions
Key Indicators:
4.5.1 Determine hiring needs
4.5.2 Describe process of recruiting, selecting, and orienting new marketing employees
4.5.3 Conduct training class/program pertaining to the marketing function

4.5.4 Identify legal issues impacting marketing personnel
4.5.5 Describe employer documentation process

BIL: Essential

EDU:	12	AD
	I	P

Competency 4.6: Provide leadership to marketing employees (4.6.1-4.6.6 Proficient at 12th grade)

Key Indicators:
4.6.1 Compare/contrast different leadership styles
4.6.2 Identify factors that influence choice of leadership style in a given situation
4.6.3 Identify methods to build employee morale
4.6.4 Evaluate ways to motivate employees
4.6.5 Analyze the relationship between communication and employee attitude
4.6.6 Analyze the concept of employee participation in decision-making
4.6.7 Provide feedback regarding marketing work efforts
4.6.8 Encourage team building among marketing staff and with other stakeholders
4.6.9 Handle employee complaints and grievances
4.6.10 Ensure equitable opportunities for employees
4.6.11 Assess employee morale
4.6.12 Conduct staff meetings

BIL: Essential

EDU:	12	AD
	I	P

Competency 4.7: Use controlling functions in managing marketing

Key Indicators:
4.7.1 Explain employee's role in expense control
4.7.2 Describe nature of managerial control (e.g., control process, types of control, what is controlled)
4.7.3 Negotiate service and maintenance contracts for the marketing department
4.7.4 Differentiate between fixed and variable and long- and short-term expenses
4.7.5 Explain risk and rewards of expense control
4.7.6 Use budgets to control marketing operations
4.7.7 Explain marketing expense-control plans
4.7.8 Analyze operating results in relation to budget/industry
4.7.9 Develop a budget and control process for the marketing department

BIL: Essential

EDU:	12	AD
	I	P

Competency 4.8: Establish criteria for purchasing products/services
Key Indicators:
4.8.1 Explain nature and scope of purchasing
4.8.2 Develop buying/purchasing policies
4.8.3 Establish criteria for managing the buying process
4.8.4 Establish criteria for qualifying vendors
4.8.5 Develop cooperative relationships with vendors
4.8.6 Conduct bidding process
4.8.7 Choose vendors
4.8.8 Describe negotiation of contracts with vendors
4.8.9 Review performance of vendors

BIL: Essential

EDU:	12	AD
	P	R

Competency 4.9: Analyze general business risk issues
Key Indicators:
4.9.1 Analyze types of business risk
4.9.2 Identify speculative business risks
4.9.3 Describe routine security precautions
4.9.4 Develop strategies to protect digital data
4.9.5 Explain nature of risk management
4.9.6 Analyze liability issues
4.9.7 Analyze marketing risks
4.9.8 Describe how business risks affect the marketing functions
4.9.9 Describe disaster preparedness and recovery plans

BIL: Recommended

EDU:	12	AD
	P	R

Competency 4.10: Manage business risks
Key Indicators:
4.10.1 Identify types of insurance coverage
4.10.2 Develop policies/procedures for preventing internal theft

4.10.3 Develop policies and procedures for preventing vendor theft
4.10.4 Develop procedures for preventing burglary
4.10.5 Manage a product/service contract

BIL: Essential

EDU:	12	AD
	P	R

Competency 4.11: Analyze safety risks
Key Indicators:
4.11.1 Explain routine security precautions
4.11.2 Follow safety precautions
4.11.3 Implement procedures for handling accidents
4.11.4 Implement procedures for dealing with workplace threats
4.11.5 Follow procedures for correcting hazardous conditions
4.11.6 Describe fire-prevention program
4.11.7 Describe safety policies and procedures

BIL: Essential

EDU:	12	AD
	I	P

Competency 4.12: Follow business regulations
Key Indicators:
4.12.1 Identify legal issues affecting businesses
4.12.2 Interpret personnel regulations
4.12.3 Interpret workplace regulations
4.12.4 Identify trade regulations
4.12.5 Identify environmental regulations
4.12.6 Identify how tax regulations affect business
4.12.7 Identify tax regulations
4.12.8 Complete reporting requirements

BIL: Essential

EDU:	12	AD
	I	P

Competency 4.13: Examine entrepreneurship
Key Indicators:
4.13.1 Evaluate personal interests and skills
4.13.2 Compare personal interests and skills with those needed by an entrepreneur
4.13.3 Assess abilities and aptitudes to become a successful entrepreneur
4.13.4 Determine motives for becoming an entrepreneur
4.13.5 Examine characteristics of entrepreneurs
4.13.6 Compare business ownership to working for others
4.13.7 Explain components of a business plan
4.13.8 Explain the purpose of a business plan
4.13.9 Develop a business plan

Instructional Unit 5: Marketing Planning

BIL: Essential

EDU:	12	AD
	P	R

Competency 5.1: Explain the role of marketing management
Key Indicators:
5.1.1 Describe the role of the marketing manager
5.1.2 Identify challenges faced by marketing management
5.1.3 Explain strategic marketing planning
5.1.4 Explain the nature of marketing audits
5.1.5 Explain the marketing planning process

BIL: Essential

EDU:	12	AD
	P	R

Competency 5.2: Explain nature of marketing plans
Key Indicators:
5.2.1 Define marketing plan and situational analysis
5.2.2 Explain benefits associated with having a marketing plan
5.2.3 Identify components of marketing plans
5.2.4 Describe purpose of each component of marketing plan
5.2.5 Identify the marketing decision/problem (e.g., recognize problem exists, search for underlying cause, define problem, refine problem, classify problem, define additional goals)
5.2.6 Develop alternative responses to decisions/problems
5.2.7 Establish criteria for evaluating alternative responses to decisions/problems
5.2.8 Demonstrate financial analysis techniques to make marketing decisions
5.2.9 Demonstrate non-financial analysis techniques to make marketing decisions

BIL: Essential

EDU:	12	AD
	I	P

Competency 5.3: Analyze influence of external factors on marketing planning
Key Indicators:
5.3.1 Analyze legal and political factors that affect marketing strategies

5.3.2 Differentiate between ethical and unethical marketing practices
5.3.3 Identify differences in ethical standards in international markets
5.3.4 Compare/contrast legal and ethical marketing practices
5.3.5 Analyze impact of changing economic conditions on marketing strategies
5.3.6 Describe ways marketing strategies are altered to meet competition
5.3.7 Analyze ways in which marketers may respond to concerns of special groups
5.3.8 Analyze social environments that affect marketing (i.e., consumerism, product quality, activism)
5.3.9 Analyze ways in which changing cultural characteristics impact marketing
5.3.10 Determine new ways of marketing products using emerging and evolving technologies
5.3.11 Analyze cost/benefit of different technological approaches to marketing
5.3.12 Examine advantages and disadvantages of a heavy reliance on technological approaches to marketing
5.3.13 Analyze the impact of short-term versus long-term planning

BIL: Essential

EDU:	12	AD
	P	R

Competency 5.4: Identify considerations in implementing international marketing strategies

Key Indicators:

5.4.1 Explain factors that affect implementation of product strategies in an international market
5.4.2 Describe factors that affect implementation of place strategies in an international market
5.4.3 Discuss factors that impact price strategies in an international market
5.4.4 Describe factors that impact promotion strategies in an international market

BIL: Essential

EDU:	12	AD
	P	R

Competency 5.5: Describe concepts of market and market identification

Key Indicators:

5.5.1 Explain importance of target markets to business
5.5.2 Explain importance of target marketing
5.5.3 Describe advantages and disadvantages of mass marketing
5.5.4 Describe advantages and disadvantages of using market segments
5.5.5 Describe levels of segmentation
5.5.6 Identify descriptor variables for consumer marketing
5.5.7 Describe demographic, geographic, and psychographic characteristics that are analyzed by marketers

5.5.8 Explain technographics in segmentation (i.e., computer knowledge, Internet knowledge)
5.5.9 Describe types of behavioral segmentation
5.5.10 Explain segmentation schemes used for organizational buyers
5.5.11 Explain use of commerce statistics and data mining in segmentation
5.5.12 Explain how culture impacts consumer purchase behavior
5.5.13 Explain how lifestyle impacts consumer purchase behavior
5.5.14 Use information on beliefs and attitudes to develop strategies
5.5.15 Identify stages of the consumer buying process
5.5.16 Explain nature of organizational buying processes

BIL: Essential

EDU:	12	AD
	P	R

Competency 5.6: Select target market
Key Indicators:
5.6.1 Distinguish between segment and individual marketing
5.6.2 Compare niche and differentiated marketing
5.6.3 Describe use of customer profiles in selecting target markets
5.6.4 Identify criteria used by marketers to select viable target markets
5.6.5 Estimate a segment's market potential
5.6.6 Explain components of a marketing segmentation analysis
5.6.7 Describe global issues in selecting international target markets
5.6.8 Develop procedures for selecting target markets

BIL: Essential

EDU:	12	AD
	P	R

Competency 5.7: Explain role of SWOT (Strengths, Weaknesses, Opportunities, Threats) in marketing-planning process
Key Indicators:
5.7.1 Explain how environmental threats for one company can represent opportunities for another company
5.7.2 Discuss purpose of environmental scanning and monitoring in situational analysis
5.7.3 Explain why businesses should evaluate their internal environments in context of changes occurring in their external environments

BIL: Essential

EDU:	12	AD
	I	P

Competency 5.8: Conduct SWOT analysis for use in marketing planning process
Key Indicators:
5.8.1 Explain whom to involve in a SWOT analysis
5.8.2 Discuss when a SWOT analysis should be conducted
5.8.3 Describe benefits of conducting a SWOT analysis
5.8.4 Identify factors that should be considered in a SWOT analysis
5.8.5 Demonstrate procedures for conducting a SWOT analysis for use in marketing planning

BIL: Essential

EDU:	12	AD
	I	P

Competency 5.9: Align marketing objectives/strategies with the company's strategic plan
Key Indicators:
5.9.1 Develop marketing objectives based on a strategic business plan
5.9.2 Evaluate effects of external forces
5.9.3 Develop marketing strategies to achieve company goals/objectives
5.9.4 Explain external planning considerations

BIL: Essential

EDU:	12	AD
	P	R

Competency 5.10: Develop a marketing plan
Key Indicators:
5.10.1 Identify organization's mission
5.10.2 Determine organizational resources
5.10.3 Complete a SWOT analysis
5.10.4 Identify overall marketing objectives
5.10.5 Select target markets
5.10.6 Use marketing research as needed
5.10.7 Develop objectives for each target market
5.10.8 Develop marketing mix strategies
5.10.9 Develop tactics (i.e., action plan)
5.10.10 Develop a budget

BIL: Essential

EDU:	12	AD
	I	P

Competency 5.11: Use measures to control marketing planning
Key Indicators:
5.11.1 Explain importance of controlling marketing planning activities
5.11.2 Discuss reasons that sales should be analyzed to control marketing planning
5.11.3 Describe how sales analysis is used as a control measure in marketing planning
5.11.4 Describe types of sales analysis measures used in marketing planning
5.11.5 Explain strengths/weaknesses of sales measurement techniques
5.11.6 Discuss how customer-satisfaction analysis is used as a control measure in marketing planning
5.11.7 Explain use of profitability analysis as a control measure in marketing planning
5.11.8 Discuss use of profit margins in adjusting marketing mixes
5.11.9 Explain purpose of activity-based costing in controlling marketing planning
5.11.10 Establish metrics for measuring success (i.e., return on investment [ROI])

BIL: Essential

EDU:	12	AD
	I	P

Competency 5.12: Evaluate performance of marketing plan
Key Indicators:
5.12.1 Explain use of standards in evaluating performance of a marketing plan
5.12.2 Discuss frequency with which marketing plan performance should be evaluated
5.12.3 Describe actions to take when performance and objectives differ
5.12.4 Demonstrate procedures for evaluating performance of a marketing plan
5.12.5 Assess ROI using established metrics

BIL: Recommended

EDU:	12	AD
	I	R

Competency 5.13: Conduct marketing audits
Key Indicators:
5.13.1 Explain purpose of marketing audits
5.13.2 Describe characteristics of an effective marketing audits

5.13.3 Explain process for conducting a marketing audit
5.13.4 Demonstrate procedures for conducting marketing audits

Instructional Unit 6: Marketing Information Management

BIL: Essential

EDU:	12	AD
	P	R

Competency 6.1: Explain nature and scope of marketing information management function

Key Indicators:

6.1.1 Describe need for marketing information
6.1.2 Classify types of marketing information as primary or secondary
6.1.3 Describe types of information marketers should obtain
6.1.4 Categorize internal sources of marketing information
6.1.5 Discuss external sources of marketing information
6.1.6 Explain functions of a marketing-information management system
6.1.7 Contrast marketing research with a marketing information system
6.1.8 Describe use of a marketing information system
6.1.9 Explain benefits of a marketing information management system
6.1.10 Describe limitations of marketing information management systems

BIL: Essential

EDU:	12	AD
	P	R

Competency 6.2: Demonstrate components of a marketing-information management system

Key Indicators:

6.2.1 Describe issues associated with development of a marketing-information management system
6.2.2 Explain ways to equip a marketing-information management system
6.2.3 Describe ways to staff a marketing-information management system
6.2.4 Demonstrate procedures for developing a marketing-information management system
6.2.5 Assess marketing information needs
6.2.6 Explain role of ethics in marketing-information management
6.2.7 Describe use of technology in marketing-information management function
6.2.8 Describe sources of secondary data
6.2.9 Search Internet for marketing information
6.2.10 Examine internal records for marketing information (e.g., sales and expense reports, customer records, shipping information)
6.2.11 Collect marketing information from others (e.g., customers, staff, vendors)

BIL: Essential

EDU:	12	AD
	P	R

Competency 6.3: Explain use of databases in organizing marketing data
Key Indicators:
6.3.1 Compare way in which sequential database systems organize information with that of relational database systems
6.3.2 Discuss advantages and limitations of each database system
6.3.3 Describe importance of data base management and mining
6.3.4 Explain ways databases can be used to organize information about customers and their purchases
6.3.5 Describe ways that databases can be used to generate marketing reports

BIL: Essential

EDU:	12	AD
	I	P

Competency 6.4: Manipulate a database for retrieval of information
Key Indicators:
6.4.1 Identify questions that must be answered to design a database for retrieval of marketing information
6.4.2 Describe guidelines for designing a database for retrieval of marketing information
6.4.3 Describe procedures for designing a database for retrieval of marketing information

BIL: Essential

EDU:	12	AD
	I	P

Competency 6.5: Use database information analysis
Key Indicators:
6.5.1 Explain considerations in manipulating data to create reports
6.5.2 Describe procedures for manipulating data for information analysis
6.5.3 Demonstrate use of database for information analysis

BIL: Essential

EDU:	12	AD
	P	R

Competency 6.6: Write marketing reports
Key Indicators:
6.6.1 Discuss characteristics of an effective marketing report
6.6.2 Identify elements of a marketing report
6.6.3 Describe types of visual aids that can be used effectively in marketing reports
6.6.4 Create tables and graphs for reports
6.6.5 Explain considerations in manipulating data to create reports
6.6.6 Prepare marketing reports using key elements and characteristics

BIL: Essential

EDU:	12	AD
	P	R

Competency 6.7: Present report findings and recommendations
Key Indicators:
6.7.1 Compare/contrast presentation of marketing reports in oral versus written format
6.7.2 Identify elements of a marketing report that should be addressed in an oral presentation
6.7.3 Demonstrate procedures for presenting report findings and recommendations
6.7.4 Utilize presentation software to enhance presentation of marketing reports

BIL: Essential

EDU:	12	AD
	I	P

Competency 6.8: Explain nature of forecasts
Key Indicators:
6.8.1 Identify items/factors for which sales forecasts can be used
6.8.2 Discuss timeframe of sales forecasts
6.8.3 Explain factors affecting how far ahead a business should predict sales
6.8.4 Distinguish between qualitative and quantitative forecasting methods
6.8.5 Describe factors affecting sales forecast
6.8.6 Explain business activities in which sales forecast information is used as a planning tool
6.8.7 Explain reasons that not all businesses use sales forecasts
6.8.8 Define subsets and correlation

BIL: Essential

EDU:	12	AD
	I	P

Competency 6.9: Forecast sales
Key Indicators:
6.9.1 Describe approaches to forecasting sales
6.9.2 Discuss methods of forecasting sales
6.9.3 Describe advantages and disadvantages associated with each forecasting methods
6.9.4 Explain factors that should be considered in choosing a forecasting method
6.9.5 Describe external factors that affect sales forecasts
6.9.6 Explain internal factors that affect sales forecasts
6.9.7 Describe procedures for preparing a sales forecast
6.9.8 Demonstrate how to forecast sales

Instructional Unit 7: Project Management

BIL: Essential

EDU:	12	AD
	I	P

Competency 7.1: Coordinate the diverse components of a project
Key Indicators:

7.1.1 Select a project that fits business and organizational needs
7.1.2 Create a project plan that takes into account all aspects of the project
7.1.3 Develop a written statement outlining the scope, extent, and limits of the project
7.1.4 Define a baseline plan for a project's scope, time, and cost
7.1.5 Develop a project charter to serve as a proposal or contract document which can be used to get project approval
7.1.6 Determine the type and quantity of resources needed to complete project activities (e.g., people, equipment, software)
7.1.7 Execute activities in the project plan

BIL: Essential

EDU:	12	AD
	I	P

Competency 7.2: Manage a project
Key Indicators:

7.2.1 Manage/coordinate business, organizational, technological, and resource changes that affect an entire project
7.2.2 Redefine scope, time, and cost plan for a project when one factor must be traded off against the other
7.2.3 Determine usefulness of project management software tools
7.2.4 Use project management software tools to plan and control a project
7.2.5 Monitor project scope progress against the plan
7.2.6 Shut down a project at appropriate review points if problems are identified
7.2.7 Conclude a project when all requirements are met

BIL: Essential

EDU:	12	AD
	P	R

Competency 7.3: Explain quality
Key Indicators:

7.3.1 Describe which quality control standards are relevant to the project (e.g., ISO 9000, ISO 9001)
7.3.2 Develop a quality management plan that quantifies and coordinates the activities and that assesses the effectiveness, efficiency, and quality of the system
7.3.3 Describe quality assurance activities regularly to ensure that the project will satisfy the quality standards
7.3.4 Identify negative results detected during quality control activities
7.3.5 Identify quality initiatives in various industries (e.g., Lean, Kaizen, Baldridge)

BIL: Essential

EDU:	12	AD
	I	P

Competency 7.4: Manage quality project information
Key Indicators:

7.4.1 Determine information and communication needs of stakeholders (e.g., what information is needed, when is it needed, and to whom will it be provided)
7.4.2 Develop a communications plan
7.4.3 Decide how information will be gathered and stored
7.4.4 Make necessary information available to project stakeholders in a concise and timely fashion (e.g., using verbal, textual, and graphical reporting tools)
7.4.5 Manage client and stakeholder relationships (e.g., to ensure commitment and involvement, to encourage effective collaboration)
7.4.6 Report on progress of project schedule, cost, and scope
7.4.7 Compare present status to the baseline to forecast future trends, using earned value analysis
7.4.8 Communicate how change will affect stakeholders
7.4.9 Generate/gather/disseminate information to formalize phase and project completion
7.4.10 Conduct a post-project audit to ensure that the actuals, risks, general findings, and "lessons learned" are documented and disseminated to support a continuous learning culture
7.4.11 Enter risk events information into the risk database and subsequent risk management process

BIL: Recommend

EDU:	12	AD
		I

Competency 7.5: Control project risk
Key Indicators:

7.5.1 Write a risk management plan to document the process, activities, milestones and responsibilities
7.5.2 Assign resources for managing risk
7.5.3 Identify internal risks (e.g., those under the control of the project: technology use, staff hired)
7.5.4 Identify external risks (e.g., those not under the control of the project: economy, political climate)
7.5.5 Evaluate risk interactions to assess the range of possible project outcomes
7.5.6 Use risk-management charts, spreadsheets, and other tools to evaluate and prioritize risks
7.5.7 Plan how to eliminate or mitigate risks by developing contingency plans
7.5.8 Use statistical methods to develop a project cost and time-estimate range quantified by risk probability and confidence level
7.5.9 Communicate risks and possible results to stakeholders
7.5.10 Monitor risk warnings and events
7.5.11 Track risks
7.5.12 Change the risk items over the course of the project according to the risk management plan
7.5.13 Document actual risk events

Instructional Unit 8: Marketing Research

BIL: Essential

EDU:	12	AD
	P	R

Competency 8.1: Describe marketing research activities
Key Indicators:
8.1.1 Define marketing research
8.1.2 Analyze role of research in marketing strategy
8.1.3 Describe characteristics of marketing research environments
8.1.4 Explain relationship between members of marketing and research departments
8.1.5 Identify principle parties outside the organization that play a crucial role in defining marketing research activities

BIL: Essential

EDU:	12	AD
	P	R

Competency 8.2: Plan a research project
Key Indicators:
8.2.1 Explain the role of marketing research in addressing business problems
8.2.2 Explain how management objectives are related to research objectives
8.2.3 Explain the role of the researcher in merging and managing objectives
8.2.4 Differentiate cause from effect in addressing business problems
8.2.5 Develop working hypotheses about typical marketing problems
8.2.6 Determine the appropriate depth and level of information required
8.2.7 Explain how potential problems and opportunities are identified and defined
8.2.8 Set requirements for tracking research projects
8.2.9 Determine the value of information
8.2.10 Identify potential cost/time/value trade-offs
8.2.11 Determine the cost of marketing research studies
8.2.12 Create a research proposal
8.2.13 Identify major federal regulations that have an impact on the practice of marketing research
8.2.14 Identify the steps of marketing research
8.2.15 Prepare proposed research project plan
8.2.16 Present proposed research study plan to stakeholders

BIL: Essential

EDU:	12	AD
	P	R

Competency 8.3: Identify ethical issues in marketing research
Key Indicators:
8.3.1 Discuss ethics in marketing research
8.3.2 Discuss ethical issues relating to respondents, clients, and general public
8.3.3 Present a behavioral decision model of ethical/unethical decisions
8.3.4 Present possible solutions to control current unethical marketing research practices

BIL: Essential

EDU:	12	AD
	I	P

Competency 8.4: Design a marketing research study
Key Indicators:
8.4.1 Describe the steps in the scientific method and its relationship to marketing research
8.4.2 Describe differences between laboratory and field environments
8.4.3 Introduce concepts of experimentation and causality
8.4.4 Explain necessary and sufficient conditions for inferring cause-and effect relationships and what is meant by spurious correlation
8.4.5 Define basic concepts of experimentation (e.g., experimental design, treatment, experimental effects, extraneous casual factors)
8.4.6 Evaluate various research designs
8.4.7 Explain the difference between exploratory and conclusive research designs
8.4.8 Describe advantages and disadvantages of qualitative and quantitative research
8.4.9 Explain appropriate use of primary and secondary research
8.4.10 Analyze sources of secondary market data
8.4.11 Use online databases
8.4.12 Identify sources for primary data
8.4.13 Describe methods for obtaining primary data
8.4.14 Explain possible sources of error in a research design
8.4.15 Address validity and reliability in design
8.4.16 Select appropriate research designs for various research objectives
8.4.17 Explain general characteristics and advantages of store audits
8.4.18 Explain general characteristics, advantages, disadvantages and uses of electronic scanner services, and single source information
8.4.19 Illustrate increasing importance of electronic scanner services
8.4.20 Prepare market research study design

BIL: Essential

EDU:	12	AD
	I	P

Competency 8.5: Use data collection methods
Key Indicators:
8.5.1 Describe pros and cons of commonly used qualitative research techniques
8.5.2 Describe pros and cons of direct questioning, observation, and in-market experiments
8.5.3 Explain major uses of focus groups and in-depth interviews, on-line panels, and wireless panels
8.5.4 Explain general characteristics, advantages, disadvantages, and uses of diary panels
8.5.5 Describe leading diary panel services covering purchase and media panels
8.5.6 Describe projective techniques
8.5.7 Identify impact of technology on qualitative designs
8.5.8 Demonstrate how to conduct an observational research study
8.5.9 Discuss pros and cons of using survey research
8.5.10 Demonstrate how to conduct direct questioning research (e.g., phone, electronic)
8.5.11 Use survey-interviewing methods
8.5.12 Describe distinctive nature of mail, telephone, personal in-home and mall-intercept interviews
8.5.13 Describe how sophisticated computer technology is used in survey research
8.5.14 Discuss problems and methods for handling bias in qualitative research
8.5.15 Collect data using appropriate method for research project
8.5.16 Document data collected in usable format
8.5.17 Design a focus group and in-depth interview discussion guide

BIL: Essential

EDU:	12	AD
	I	P

Competency 8.6: Describe fundamentals of sampling
Key Indicators:
8.6.1 Discuss key elements involved in devising a sampling plan
8.6.2 Illustrate distinctive features of probability and nonprobability samples
8.6.3 Describe major types and primary practical uses of both probability and nonprobability samples
8.6.4 Discuss primary approaches for determining sample size
8.6.5 Define concepts of sampling vs. nonsampling errors
8.6.6 Explain what factors contribute to non-response and response errors
8.6.7 Describe how response rates can be improved
8.6.8 Identify remedies for non-response error

8.6.9 Describe issues to consider when designing a sampling plan
8.6.10 Explain how to draw simple random samples, systematic samples, stratified samples, and cluster samples

BIL: Essential

EDU:	12	AD
	P	R

Competency 8.7: Evaluate concepts of measurement and measurement scales
Key Indicators:
8.7.1 Define basic concepts of measurement and scaling
8.7.2 Distinguish among various types of measurement scales (e.g., Likert Scale, semantic differential scaling, ratings scales, ranking scales)
8.7.3 Discuss single-item versus multiple-item scales
8.7.4 Discuss concepts of validity and reliability

BIL: Essential

EDU:	12	AD
	I	P

Competency 8.8: Design measurement instruments
Key Indicators:
8.8.1 Explain importance of questionnaire design and field execution
8.8.2 Describe questionnaire design process
8.8.3 Explain guidelines that must be followed in questionnaire design
8.8.4 Identify differences between types of interview questionnaires (e.g., phone, mail, personal)
8.8.5 Design observational forms
8.8.6 Discuss the use of concept boards, videos, and other visual aids in surveys
8.8.7 Design survey forms
8.8.8 Describe the use of computerized data collection instruments

BIL: Essential

EDU:	12	AD
	I	P

Competency 8.9: Describe/conduct data collection
Key Indicators:
8.9.1 Develop a data collection plan
8.9.2 Describe when pre-coding a questionnaire is appropriate
8.9.3 Develop interviewing procedures and standards
8.9.4 Identify questioning and recording techniques for specific types of questions (e.g., open-ended, closed-ended, verbal and numerical scales)
8.9.5 Identify management control mechanisms needed in collecting data
8.9.6 Describe coding of various open-ended responses
8.9.7 Describe procedure for checking editing questionnaires
8.9.8 Describe data entry process quality controls

BIL: Essential

EDU:	12	AD
	I	P

Competency 8.10: Perform data analysis
Key Indicators:
8.10.1 Discuss data summary methods (e.g., measures of central tendency, measure of variability)
8.10.2 Use cross tabulations
8.10.3 Represent data graphically

BIL: Essential

EDU:	12	AD
	I	P

Competency 8.11: Evaluate hypothesis testing
Key Indicators:
8.11.1 Describe procedure for testing hypothesis
8.11.2 Describe ways to use hypotheses to test specific ideas concerning means and proportions
8.11.3 Evaluate differences between statistical significance and practical importance

BIL: Recommended

EDU:	12	AD
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Competency 8.12: Use measures of association, regression analysis, and variance
Key Indicators:
8.12.1 Present notion of conversation between two random variables
8.12.2 Demonstrate calculation of correlation coefficients for variables measured on interval, ordinal, or nominal scales
8.12.3 Use simple regression analysis to predict values of one variable, given a value for manor variable
8.12.4 Provide statistical tests for regression coefficients
8.12.5 Describe assumptions underlying regression analysis
8.12.6 Explain concept of co-variance and correlation

BIL: Essential

EDU:	12	AD
	I	P

Competency 8.13: Evaluate strategic marketing studies
Key Indicators:
8.13.1 Define philosophy and objectives behind strategic marketing studies
8.13.2 Describe role of strategic marketing studies
8.13.3 Discuss basic strategic marketing studies (e.g., positioning studies, market segmentation studies, market structure studies)
8.13.4 Describe various methods used in basic types of strategic marketing studies

BIL: Essential

EDU:	12	AD
	I	P

Competency 8.14: Describe concept and product testing
Key Indicators:
8.14.1 Describe importance of concept and product tests
8.14.2 Describe different types of concept tests
8.14.3 Define purpose of procedures used in concept screening tests
8.14.4 Define purpose of procedures used in concept evaluation tests
8.14.5 Describe role of product testing
8.14.6 Define various types of product tests
8.14.7 Describe when to use concept and product testing

BIL: Recommended

EDU:	12	AD
	I	P

Competency 8.15: Describe characteristics of a name and package testing study
Key Indicators:
8.15.1 Describe how new names are created
8.15.2 Describe primary approach to naming a product
8.15.3 Define information typically collected in name testing studies
8.15.4 Describe how name tests are implemented
8.15.5 Define basic functions that a package serves
8.15.6 Outline reasons for conducting a package test study
8.15.7 Describe how package tests are implemented

BIL: Essential

EDU:	12	AD
	I	P

Competency 8.16: Describe advertising research
Key Indicators:
8.16.1 Describe purposes advertising serves
8.16.2 Define what is meant by advertising effectiveness
8.16.3 Illustrate standard copy testing practices in print and television media
8.16.4 Discuss objectives of market tracking and market testing studies
8.16.5 Identify when to use advertising research

BIL: Recommended

EDU:	12	AD
		I

Competency 8.17: Interpret test market studies
Key Indicators:
8.17.1 Describe information provided by good test market programs
8.17.2 List basic steps in test market studies
8.17.3 Use procedures in standard test market audits and controlled test market audits
8.17.4 Interpret a comparative survey of simulated/pretest market services
8.17.5 Evaluate proposed design for test market study

BIL: Essential

EDU:	12	AD
	I	P

Competency 8.18: Use online market research tools
Key Indicators:
8.18.1. Identify electronic research tools (e.g., e-mail, web surveys, list serves)
8.18.2. Use online market research services
8.18.3. Use methods of conducting online research
8.18.4. Explain challenges of online surveys (e.g., demographics, psychographics)
8.18.5. Identify online random sampling methods
8.18.6. Explain the use of voluntary research panels
8.18.7. Explain the use of online customer registration in market research
8.18.8. Identify advantages and disadvantages of requiring online customer registration
8.18.9. Identify advantages and disadvantages of conducting online market research
8.18.10. Identify costs associated with online market research

BIL: Essential

EDU:	12	AD
	I	P

Competency 8.19: Develop marketing research projects
Key Indicators:
8.19.1 Identify staffing needs
8.19.2 Create a research budget
8.19.3 Develop controls for research projects
8.19.4 Identify trade-offs between conducting primary research and purchasing research from a firm
8.19.5 Describe considerations when outsourcing research

BIL: Essential

EDU:	12	AD
	P	R

Competency 8.20: Present research to management
Key Indicators:
8.20.1 Explain issues involved in communicating research findings to management
8.20.2 Use general guidelines for writing research project
8.20.3 Explain organization of research project

8.20.4 Illustrate data effectively
8.20.5 Use general guidelines for an oral presentation
8.20.6 Use visual aids
8.20.7 Describe the differences between presenting facts and opinions, and how each is handled in a presentation
8.20.8 Use effective ways to present complex statistics to business people
8.20.9 Use graphics in business presentations
8.20.10 Provide management with written reports of research findings
8.20.11 Present oral report of research findings using media as needed
8.20.12 Create executive summaries

Instructional Unit 9: Pricing

BIL: Essential

EDU:	12	AD
	P	R

Competency 9.1: Evaluate pricing fundamentals
Key Indicators:
9.1.1 Explain the nature and scope of the pricing function
9.1.2 Evaluate the role of business ethics in pricing
9.1.3 Evaluate the use of technology in pricing
9.1.4 Identify the basic considerations consumers and businesses weigh in accepting a price
9.1.5 Discuss/analyze price-setting process
9.1.6 Explain pricing objectives
9.1.7 Explain price sensitivity
9.1.8 Discuss/Analyze price elasticity
9.1.9 Explain price testing
9.1.10 Research competitors prices
9.1.11 Explain real-time pricing in the online environment
9.1.12 Identify how pricing is affected by stages of the product life cycle
9.1.13 Evaluate relationship between price and value

BIL: Essential

EDU:	12	AD
	P	R

Competency 9.2: Describe pricing strategies
Key Indicators:
9.2.1 Evaluate features, purposes, advantages, and disadvantages of cost-based pricing strategies
9.2.2 Evaluate characteristics, goals, advantages, and disadvantages of demand-based pricing strategies
9.2.3 Evaluate characteristics, goals, advantages, and disadvantages of competition-based pricing strategies
9.2.4 Evaluate characteristics, goals, advantages, and disadvantages of product mix pricing strategies
9.2.5 Evaluate characteristics, goals, advantages, and disadvantages of product change pricing strategies
9.2.6 Evaluate characteristics, goals, advantages, and disadvantages of segmented (e.g., customer segmented, location, time) pricing strategies
9.2.7 Evaluate impact of e-commerce on pricing strategies

BIL: Essential

EDU:	12	AD
	I	P

Competency 9.3: Evaluate pricing techniques
Key Indicators:
9.3.1 Evaluate psychological pricing
9.3.2 Describe geographic pricing
9.3.3 Evaluate discount pricing techniques
9.3.4 Describe promotional pricing techniques

BIL: Essential

EDU:	12	AD
	I	P

Competency 9.4: Determine prices
Key Indicators:
9.4.1 Determine pricing objective(s)
9.4.2 Calculate cost of product
9.4.3 Evaluate break-even point
9.4.4 Evaluate elasticity of demand
9.4.5 Analyze competitors' prices
9.4.6 Select a pricing strategy
9.4.7 Set prices
9.4.8 Adjust prices to maximize profitability
9.4.9 Evaluate difficulties in applying traditional pricing strategies to e-commerce
9.4.10 Identify impact of changing market conditions on prices
9.4.11 Identify key legal issues in setting prices

Instructional Unit 10: Promotion

BIL: Essential

EDU:	12	AD
	P	R

Competency 10.1: Analyze promotion fundamentals
Key Indicators:
10.1.1 Describe the benefits of using promotion
10.1.2 Evaluate costs associated with the use of promotion
10.1.3 Describe types of promotional objectives
10.1.4 Explain types of promotion
10.1.5 Describe the importance of the promotional mix vs. single promotional element
10.1.6 Analyze factors affecting the promotional mix
10.1.7 Describe the use of business ethics in promotion
10.1.8 Evaluate the importance of coordinating promotional mix elements
10.1.9 Evaluate the Return On Investment (ROI) of promotion

BIL: Essential

EDU:	12	AD
	P	R

Competency 10.2: Explain communication process used in promotion
Key Indicators:
10.2.1 Distinguish between personal and nonpersonal communication processes
10.2.2 Explain importance of using an effective communication process in promotion
10.2.3 Describe barriers to effective communication in promotion
10.2.4 Explain techniques for overcoming barriers to effective communication in promotion

BIL: Essential

EDU:	12	AD
	P	R

Competency 10.3: Describe promotion laws and regulations
Key Indicators:
10.3.1 Explain need for truthfulness in promotional messages and claims
10.3.2 Discuss how use of misleading or inaccurate statements in promotion is regulated
10.3.3 Describe actions that can be taken by Federal Trade Commission to correct misleading advertising

10.3.4 Discuss reasons for regulation of products used in advertising
10.3.5 Explain how legality of products used in advertising can vary from country to country
10.3.6 Describe legal issues used in promotion
10.3.7 Identify state regulations related to promotion

BIL: Essential

EDU:	12	AD
	P	R

Competency 10.4: Analyze advertising
Key Indicators:
10.4.1 Analyze the concepts of advertising media
10.4.2 Analyze the types, advantages and disadvantages of broadcast media
10.4.3 Analyze the types, advantages and disadvantages print media
10.4.4 Analyze the types, advantages and disadvantages of specialty advertising
10.4.5 Analyze the types, advantages and disadvantages of Internet advertising (e.g., interacting personally, wireless network)
10.4.6 Analyze the nature of direct advertising strategies (e.g., direct mail, e-mail, automated callers, faxes, catalogs)
10.4.7 Analyze frequency marketing strategies
10.4.8 Identify the difference between business-to-business and business-to-consumer advertising
10.4.9 Explain opt-in, opt-out, permission marketing as it relates to advertising
10.4.10 Identify niche advertising
10.4.11 Identify types of direct-mail promotions
10.4.12 Identify types of out-of-home media
10.4.13 Identify examples of "other media"

BIL: Recommended

EDU:	12	AD
	I	P

Competency 10.5: Describe advertising outsourcing
Key Indicators:
10.5.1 Describe services offered by each type of advertising agency
10.5.2 Identify factors that affect how advertising agencies are organized
10.5.3 Describe departments in advertising agencies
10.5.4 Discuss how advertising agencies are set up or structured
10.5.5 Explain how advertising agencies are paid for their services
10.5.6 Identify situations when outsource advertising might be used
10.5.7 Discuss advantages/disadvantages of outsource advertising

BIL: Essential

EDU:	12	AD
	P	R

Competency 10.6: Determine cost of advertising media
Key Indicators:

10.6.1 Identify factors affecting the cost of various types of advertising (e.g., newspaper ads, magazine ads, radio ads, television ads, direct mail advertising, e-mail advertising, outdoor ads)
10.6.2 Identify factors affecting the cost of banner ads (e.g., click-through pricing, bartering, Internet Advertising Bureau rate cards, audience demographics)
10.6.3 Use rate cards
10.6.4 Explain use of discount strategies
10.6.5 Examine negotiation strategies
10.6.6 Calculate media costs
10.6.7 Compare media cost effectiveness in reaching target audience
10.6.8 Evaluate media selection
10.6.9 Identify factors affecting costs of affiliate advertising
10.6.10 Explain benefits of alliances and partnerships

BIL: Essential

EDU:	12	AD
	I	P

Competency 10.7: Evaluate Internet advertising
Key Indicator

10.7.1 Describe types of Internet ads
10.7.2 Determine objective of placement (e.g., generate customer leads, create traffic)
10.7.3 Evaluate locations for ad placement (e.g., search engines, directories, specialty websites, sponsorship websites)
10.7.4 Develop an ad placement strategy
10.7.5 Define goal of Internet ads (e.g., banners, buttons)
10.7.6 Identify standard sizes for Internet ads
10.7.7 Create a tagline
10.7.8 Use design features to gain attention
10.7.9 Evaluate software packages for Internet ads management
10.7.10 Evaluate Internet ad placement strategies
10.7.11 Evaluate results
10.7.12 Evaluate cost effectiveness
10.7.13 Determine types of tracking methods to be used
10.7.14 Discuss the role of online communities
10.7.15 Evaluate registration, ranking, and positioning of a website

BIL: Essential

EDU:	12	AD
	I	P

Competency 10.8: Evaluate print advertising campaigns
Key Indicators:

10.8.1 Compare the publishing lead time for newspaper display advertisements to that of magazine advertisements
10.8.2 Determine most suitable print media for a product or service considering the target market characteristics of the media and message
10.8.3 Determine ideal frequency and duration of print media advertisement campaign
10.8.4 Prepare a budget for print media advertising campaign
10.8.5 Describe procedures to place a display advertisement in a newspaper or magazine
10.8.6 Evaluate effectiveness of campaign
10.8.7 Select the most appropriate appeal for a print display advertisement (e.g., informational, emotional, variety, price, humor, persuasive)
10.8.8 Identify types of print media
10.8.9 Categorize types of newspapers
10.8.10 Explain the importance of advertisement location (e.g., column, section, page, location on page)
10.8.11 Explain the Gutenberg Diagonal and its international implications
10.8.12 Describe techniques to capture the attention of readers in print display advertisements
10.8.13 Analyze the selling power of existing commercial print display advertisement
10.8.14 Layout a display advertisement
10.8.15 Evaluate cost effectiveness
10.8.16 Evaluate results

BIL: Essential

EDU:	12	AD
	I	P

Competency 10.9: Design television advertising
Key Indicators:

10.9.1 Compare advantages and disadvantages of network, local, and cable advertising
10.9.2 Describe the target market for specific commercial television programs
10.9.3 Select the ideal placement of a television advertisement (e.g., network, local, cable, time of day, day of week, program)
10.9.4 Select the ideal frequency and duration for a television advertisement campaign
10.9.5 Describe the procedures for placing network, local, and cable television advertisements
10.9.6 Evaluate effectiveness of campaign
10.9.7 Describe the convergence of Internet and television media

10.9.8 Select the most appropriate appeal for a television advertisement (e.g., informational, emotional, variety, price, humor, persuasive)
10.9.9 Describe advantages and disadvantages of 10-second, 30-second, and 60-second television spots, and infomercials
10.9.10 Describe techniques used in television advertisements to capture the attention of viewers
10.9.11 Analyze selling power of existing television commercials
10.9.12 Develop a story board for a television advertisement
10.9.13 Design a television advertisement

BIL: Essential

EDU:	12	AD
	I	P

Competency 10.10: Design radio advertising
Key Indicators:
10.10.1 Explain the difference between local and network radio programs
10.10.2 Cite several network radio programs
10.10.3 Compare advantages and disadvantages of network vs. local radio advertising
10.10.4 Describe the target market for specific radio programs
10.10.5 Select ideal placement of a radio advertisement (e.g., time of day, day of week, program)
10.10.6 Prepare a budget for a radio advertising campaign
10.10.7 Describe procedures for placing a network and local media advertisement
10.10.8 Evaluate effectiveness of campaign
10.10.9 Select the most appropriate appeal for a radio advertisement (e.g., informational, emotional, variety, price, humor, persuasive)
10.10.10 Describe advantages and disadvantages of 15-second, 30-second, and 60-second radio spots
10.10.11 Describe techniques used in radio advertisement to capture the attention of listeners
10.10.12 Analyze the selling power of existing radio advertisements
10.10.13 Write a script for a radio advertisement

BIL: Essential

EDU:	12	AD
	P	R

Competency 10.11: Develop publicity and public relations activities
Key Indicators:
10.11.1 Differentiate between publicity and public relations
10.11.2 Describe advantages and disadvantages of publicity and public relations

10.11.3 Describe steps for obtaining publicity
10.11.4 Identify ways to leverage negative publicity
10.11.5 Describe the impact of the Internet on publicity
10.11.6 Describe advantages of participating in community activities
10.11.7 Develop a publicity plan
10.11.8 Develop a public relations plan
10.11.9 Write a news release

BIL: Essential

EDU:	12	AD
	P	R

Competency 10.12: Develop sales promotion activities
Key Indicators:
10.12.1 Identify types of sales promotion (e.g., coupons, premiums, sweepstakes)
10.12.2 Identify how sales promotion can be used
10.12.3 Calculate costs of sales promotion activities
10.12.4 Determine when sales promotion activities are the best promotional tool
10.12.5 Generate a sales promotion plan
10.12.6 Identify Return On Investment (ROI) of sales promotion activities
10.12.7 Evaluate sales promotion activities

BIL: Recommended

EDU:	12	AD
	I	P

Competency 10.13: Analyze affiliate marketing and co-branding strategies
Key Indicators:
10.13.1 Explain advantages and disadvantages of promotional partnering
10.13.2 Analyze goals for promotional partnering
10.13.3 Analyze affiliate and co-branding opportunities
10.13.4 Determine costs and benefits
10.13.5 Evaluate potential partner businesses using developed selection criteria
10.13.6 Evaluate effectiveness of affiliate marketing

BIL: Essential

EDU:	12	AD
	P	R

Competency 10.14: Coordinate activities in promotional mix
Key Indicators:
10.14.1 Identify elements of promotional mix
10.14.2 Categorize examples of promotions according to elements of promotional mix
10.14.3 Describe importance of promotional mix
10.14.4 Identify factors affecting promotional mix
10.14.5 Describe how product being sold affects promotional mix
10.14.6 Explain how product's market affects promotional mix
10.14.7 Discuss how distribution system affects promotional mix
10.14.8 Explain how product's company affects promotional mix
10.14.9 Identify factors that should be coordinated for promotions
10.14.10 Identify types of promotional activities that should be coordinated
10.14.11 Describe ways to coordinate promotional efforts
10.14.12 Describe importance of coordinating promotional activities
10.14.13 Explain procedures for coordinating promotional activities
10.14.14 Use procedures to coordinate promotional activities

BIL: Essential

EDU:	12	AD
	I	P

Competency 10.15: Manage website
Key Indicators:
10.15.1 Identify sources of information about website creation
10.15.2 Explain necessity for clear communication when creating a website
10.15.3 Demonstrate procedures for creating a website
10.15.4 Develop a website design plan
10.15.5 Maintain website
10.15.6 Identify factors that contribute to effectiveness of websites
10.15.7 Discuss advantages/disadvantages of website components
10.15.8 Determine cost/benefit of website components
10.15.9 Demonstrate procedures for developing website design/components
10.15.10 Interact with technology staff in planning website
10.15.11 Select products to feature
10.15.12 Write sales copy for website

BIL: Essential

EDU:	12	AD
	I	P

Competency 10.16: Design frequency-marketing program
Key Indicators:
10.16.1 Identify situations in which businesses can effectively use frequency marketing programs
10.16.2 Explain why businesses implement frequency marketing programs
10.16.3 Analyze cost/benefits of implementing a frequency marketing program
10.16.4 Demonstrate procedures for designing a frequency marketing program

BIL: Recommended

EDU:	12	AD
	I	P

Competency 10.17: Develop co-op advertising
Key Indicators:
10.17.1 Identify types of promotional allowances available to businesses
10.17.2 Describe benefits of obtaining promotional allowances
10.17.3 Describe guidelines to follow when obtaining promotional allowances
10.17.4 Demonstrate procedures for managing promotional allowances

BIL: Essential

EDU:	12	AD
	P	R

Competency 10.18: Develop a promotional plan
Key Indicators:
10.18.1 Identify the target market
10.18.2 Develop objectives
10.18.3 Choose a theme
10.18.4 Develop promotional mix strategies
10.18.5 Develop a media plan
10.18.6 Develop timeline and action plan
10.18.7 Coordinate promotional activities
10.18.8 Develop a budget
10.18.9 Evaluate plan using milestones and benchmarks
10.18.10 Describe advantages/disadvantages of using direct advertising

Instructional Unit 11: Product and Service Management

BIL: Essential

EDU:	12	AD
	P	R

Competency 11.1: Describe factors involved in product/service operations
Key Indicators:

11.1.1 Identify organization objectives
11.1.2 Identify stages of product/service development
11.1.3 Identify elements of product positioning
11.1.4 Identify stages in a product life cycle
11.1.5 Identify the importance of product/service grades and standards
11.1.6 Describe the importance of warranties and guaranties
11.1.7 Describe product/service liability issues
11.1.8 Identify consumer protection provisions of appropriate agencies

BIL: Essential

EDU:	12	AD
	P	R

Competency 11.2: Plan product/service management strategies
Key Indicators:

11.2.1 Describe the role of product/service management in business success
11.2.2 Describe components of product/service management
11.2.3 Describe the product/service planning process
11.2.4 Describe characteristics of product/service bundling, product line diversification, and service extensions
11.2.5 Explain impact of business environment (e.g., online vs. "brick-and-mortar") on product selection
11.2.6 Compare/contrast competition (e.g., their product/service mix, prices, sales, promotional techniques)
11.2.7 Develop a product/service portfolio
11.2.8 Identify strengths and weaknesses of product portfolio analysis
11.2.9 Plan product/service mix
11.2.10 Use customer feedback
11.2.11 Evaluate product/service management strategies
11.2.12 Evaluate factors used in adjusting product/service mix

BIL: Essential

EDU:	12	AD
	P	R

Competency 11.3: Analyze service-planning issues
Key Indicators
11.3.1 Explain major characteristics of services
11.3.2 Identify service marketing issues
11.3.3 Contrast product and service marketing
11.3.4 Identify ways to differentiate services
11.3.5 Analyze gaps in service quality and their impact on profit
11.3.6 Describe management of service productivity

BIL: Essential

EDU:	12	AD
	I	P

Competency 11.4: Develop new products/services
Key Indicators:
11.4.1 Identify sources of ideas for new products/services
11.4.2 Identify whether products are most likely to succeed in a brick-and-mortar or e-commerce venture
11.4.3 Identify methods of screening ideas for new products/services
11.4.4 Identify preliminary sales estimate
11.4.5 Identify methods for evaluating a new product/service idea
11.4.6 Explain importance of pretesting a product/service prototype
11.4.7 Identify types of potential products
11.4.8 Generate ideas
11.4.9 Screen ideas
11.4.10 Test concept
11.4.11 Test market marketing mix decisions (e.g., distribution, price)
11.4.12 Test market
11.4.13 Forecast sales
11.4.14 Introduce product
11.4.15 Conduct breakeven analysis
11.4.16 Develop a product launch plan

BIL: Essential

EDU:	12	AD
	P	R

Competency 11.5: Evaluate positioning
Key Indicators:
11.5.1 Describe factors used by marketers to position products/businesses/services
11.5.2 Explain logo ownership rights
11.5.3 Evaluate co-branding and its impact on positioning
11.5.4 Evaluate role of customer service in positioning/image

BIL: Essential

EDU:	12	AD
	P	R

Competency 11.6: Explain packaging principles
Key Indicators:
11.6.1 Describe impact of packaging decisions on customer response and on marketing mix elements
11.6.2 Describe primary functions of packaging
11.6.3 Describe elements of package design (e.g., color, style, copy, form)
11.6.4 Explain the necessity of packaging decision tradeoffs
11.6.5 Describe typical criticisms of packaging
11.6.6 Identify the main function of a label on a package
11.6.7 Describe three basic kinds of labels
11.6.8 Explain how labeling decisions supplement packaging decisions
11.6.9 Explain packaging and labeling laws
11.6.10 Participate in packaging decisions
11.6.11 Explain costs associated with packaging
11.6.12 Explain how packaging impacts product shipment and returns

Instructional Unit 12: Branding

BIL: Essential

EDU:	12	AD
	P	R

Competency 12.1: Evaluate branding concepts
Key Indicators:

12.1.1 Explain the concept of branding
12.1.2 Explain how the Internet affects branding
12.1.3 Explain importance of branding in buyer decision-making
12.1.4 Define trademark, brand name, brand mark, licensing, and brand equity
12.1.5 Explain halo effect
12.1.6 Evaluate reasons why customers are brand loyal
12.1.7 Describe brand strategies (e.g., family brand, individual brand, multiple-brand strategy) and advantages and disadvantages of each
12.1.8 Describe trademarks and trademark limitations
12.1.9 Explain differences between national brands, private brands, and generic brands and advantages and disadvantages of each
12.1.10 Analyze factors that influence the success of national vs. private, private vs. generic brands
12.1.11 Analyze the value of branding for businesses
12.1.12 Analyze pros and cons of branding for consumers
12.1.13 Describe URL (uniform resource locator) issues in branding
12.1.14 Identify mediums to communicate brand message
12.1.15 Analyze value of an individual brand in a competitive marketplace

BIL: Essential

EDU:	12	AD
	P	R

Competency 12.2: Build brand identity
Key Indicators:

12.2.1 Identify the key components of a brand strategy
12.2.2 Determine brand strategy
12.2.3 Determine brand name criteria
12.2.4 Create a list of potential brand names
12.2.5 Participate in selection of the names most appropriate for further testing
12.2.6 Obtain consumer reactions to selected brand names
12.2.7 Evaluate consumer reactions to selected brand names
12.2.8 Conduct basic trademark and patent copyright searches
12.2.9 Participate in final selection of brand name

12.2.10 Identify resources to conduct trademark and patent copyright searches
12.2.11 Describe the complexities and legal issues of trademarks, and patents copyrights
12.2.12 Identify business components that influence buyer perception of a brand (e.g., advertising, product presentation, customer service, packaging, shipping, public relations)
12.2.13 Integrate logos, slogans, URL, and other notations throughout offline and online publications and advertising
12.2.14 Integrate components into a consistent brand identity process

Instructional Unit 13: Selling

BIL: Essential

EDU:	12	AD
	P	R

Competency 13.1: Manage the selling function
Key Indicators:
13.1.1 Explain the purpose and importance of selling
13.1.2 Describe circumstances when personal selling is most important in the marketing mix
13.1.3 Develop company selling policies
13.1.4 Identify key factors in building a clientele
13.1.5 Implement business ethics in selling
13.1.6 Use technology in the selling function
13.1.7 Follow selling regulations
13.1.8 Evaluate the follow-up function
13.1.9 Describe automated follow-up systems
13.1.10 Explain consumer buying process
13.1.11 Identify decision makers

BIL: Essential

EDU:	12	AD
	P	R

Competency 13.2: Analyze organizational purchase processes
Key Indicators:
13.2.1 Contrast types of business buying situations
13.2.2 Identify staff roles in buying centers
13.2.3 Analyze organizational buying process stages
13.2.4 Develop a sales plan for a buying center

BIL: Recommended

EDU:	12	AD
	I	P

Competency 13.3: Integrate website into traditional sales and customer service process
Key Indicators:
13.3.1 Identify benefits of website
13.3.2 Create integrated sales presentation materials

13.3.3 Create an electronic sales presentation with an integrated Internet link
13.3.4 Identify incentives for sales staff
13.3.5 Evaluate effectiveness of integration
13.3.6 Provide employee training in integration of site
13.3.7 Identify customer service issues
13.3.8 Explain permission marketing

BIL: Essential

EDU:	12	AD
	P	R

Competency 13.4: Explain role of customer service as a component of selling relationships

Key Indicators:
13.4.1 Distinguish between customer service as a process and customer service as a function
13.4.2 Explain how customer service facilitates sales relationships
13.4.3 Identify occasions when customer service can be used to facilitate sales relationships
13.4.4 Identify features and benefits of all inventory (e.g., individual, packages, sponsorships, licenses)

BIL: Essential

EDU:	12	AD
	P	R

Competency 13.5: Analyze product information to identify product features, advantages, and benefits (FABs)

Key Indicators:
13.5.1 Identify obvious or apparent benefits
13.5.2 Identify unique or exclusive benefits
13.5.3 Identify hidden benefits
13.5.4 Prepare a FABs chart for a product
13.5.5 Identify value proposition of a product

BIL: Essential

EDU:	12	AD
	P	R

Competency 13.6: Develop company-selling policies
Key Indicators:
13.6.1 Explain importance of selling policies
13.6.2 Describe characteristics of selling policies
13.6.3 Explain why selling policies are needed
13.6.4 Describe external/internal factors that affect selling policies
13.6.5 Describe regulatory factors that affect selling policies
13.6.6 Explain problems encountered with use of selling policies
13.6.7 Develop selling-activity policies
13.6.8 Develop terms-of-sale policies
13.6.9 Develop service policies

BIL: Essential

EDU:	12	AD
	P	R

Competency 13.7: Describe nature of selling regulations
Key Indicators:
13.7.1 Identify reasons that sales activities are regulated
13.7.2 Describe unfair or deceptive sales practices that are regulated
13.7.3 Explain state and federal regulations that affect sales activities

BIL: Essential

EDU:	12	AD
	P	R

Competency 13.8: Explain selling process
Key Indicators:
13.8.1 Identify components of selling process
13.8.2 Describe importance of establishing relations with customers
13.8.3 Describe ways to discover customer needs
13.8.4 Describe components of prescribing solutions to customer needs
13.8.5 Explain importance of reaching closure in sales situations
13.8.6 Describe aspects of reaching closure in sales situations
13.8.7 Describe importance of reaffirming buyer-seller relationship
13.8.8 Describe ways to reaffirm buyer-seller relationship

13.8.9 Explain similarities/differences in ways businesses implement the selling process
13.8.10 Explain importance of using a selling process

BIL: Essential

EDU:	12	AD
	P	R

Competency 13.9: Prepare sales presentation
Key Indicators:
13.9.1 Identify reasons for preparing a sales presentation
13.9.2 Describe preparation needed for sales presentations
13.9.3 Identify factors that affect preparation for sales presentations
13.9.4 Describe ways to prepare for a sales presentation
13.9.5 Explain guidelines for preparing for a sales presentation
13.9.6 Demonstrate how to prepare for a sales presentation
13.9.7 Use presentation software to develop sales presentation and materials

BIL: Essential

EDU:	12	AD
	P	R

Competency 13.10: Establish relations with client/customer
Key Indicators:
13.10.1 Describe importance of establishing relationships with customers/clients during initial contact
13.10.2 Identify factors affecting choice of techniques to use in establishing relationships with customer/clients during initial contact
13.10.3 Describe characteristics of effective sales openings
13.10.4 Demonstrate how to establish relationships with customers/clients during initial contact
13.10.5 Identify types of customer personalities (e.g., decisive personality, impulsive personality, fact-finder personality, practical or frugal personality, informed personality, difficult personality)
13.10.6 Recognize types of customer personalities
13.10.7 Act appropriately for different customer personality types
13.10.8 Use action and appropriate guidelines for handling each type of customer personality
13.10.9 Handle difficult types of customer personalities

BIL: Essential

EDU:	12	AD
	P	R

Competency 13.11: Determine customer needs
Key Indicators:
13.11.1 Identify examples of types of questions for sales situations (e.g., open-ended, assumptive, interpretive)
13.11.2 Research the customer to identify customer needs
13.11.3 Explain importance of questioning in selling
13.11.4 Explain timing of questions in selling
13.11.5 Describe relationship of customer type to questioning style
13.11.6 Explain guidelines for questioning customers
13.11.7 Question customers to obtain information that will help to satisfy customer's needs

BIL: Essential

EDU:	12	AD
	P	R

Competency 13.12: Use selling process/techniques
Key Indicators:
13.12.1 Prospect for customers
13.12.2 Qualify customers
13.12.3 Establish relationship with client/customer
13.12.4 Describe factors that motivate customers
13.12.5 Facilitate customer-buying decisions
13.12.6 Recommend specific service
13.12.7 Describe service/product
13.12.8 Prescribe solution to customer needs
13.12.9 Convert customer/client objections into selling points
13.12.10 Demonstrate negotiation skills
13.12.11 Develop a sales proposal including legal terms and conditions
13.12.12 Set expectations of client
13.12.13 Demonstrate suggestion selling
13.12.14 Sell goods/services/ideas to individuals
13.12.15 Sell goods/services/ideas to groups
13.12.16 Use effective telephone sales techniques
13.12.17 Close sale
13.12.18 Plan follow-up strategies
13.12.19 Over deliver
13.12.20 Cultivate a continuous relationship

13.12.21 Maintain customer database
13.12.22 Plan strategies for meeting sales quota

BIL: Essential

EDU:	12	AD
	P	R

Competency 13.13: Use support activities
Key Indicators:
13.13.1 Calculate miscellaneous charges
13.13.2 Process complimentary offers and coupons/discounts
13.13.3 Calculate service cost
13.13.4 Process special orders
13.13.5 Arrange special service for customers
13.13.6 Process telephone orders
13.13.7 Write sales letters
13.13.8 Use technology to sell products

BIL: Essential

EDU:	12	AD
	I	P

Competency 13.14: Manage selling activities
Key Indicators:
13.14.1 Explain nature of sales management
13.14.2 Explain nature of sales training
13.14.3 Analyze sales reports
13.14.4 Explain nature of sales forecasts
13.14.5 Forecast sales
13.14.6 Identify key business categories for sales
13.14.7 Analyze marketing dynamics that affect sales
13.14.8 Manage customer e-mail
13.14.9 Use technology in sales management
13.14.10 Develop a sales force compensation and incentive plan
13.14.11 Set quotas
13.14.12 Structure the sales force
13.14.13 Compute appropriate sales force size
13.14.14 Determine territories
13.14.15 Evaluate effectiveness of sales force
13.14.16 Communicate sales results

Instructional Unit 14: Distribution and Logistics

BIL: Essential

EDU:	12	AD
	P	R

Competency 14.1: Analyze physical distribution strategies
Key Indicators:

14.1.1 Explain nature and scope of distribution
14.1.2 Explain nature of channels of distribution
14.1.3 Explain the role of technology in distribution
14.1.4 Analyze key factors in selecting a distribution system
14.1.5 Analyze different types of distribution channels for consumer goods
14.1.6 Analyze different types of distribution channels for industrial goods
14.1.7 Evaluate factors that influence channel length
14.1.8 Analyze channel widths (i.e., intensive distribution, exclusive distribution, selective distribution)
14.1.9 Explain how channel functions influence channel choice
14.1.10 Explain how channel flows influence channel choice
14.1.11 Explain the nature of channel member relationships
14.1.12 Explain the transfer principle
14.1.13 Explain the concepts of vertical marketing systems (VMS)
14.1.14 Explain alternatives to VMS
14.1.15 Analyze the relationship between customer service and distribution
14.1.16 Identify potential channel conflicts and possible solutions
14.1.17 Explain the interaction between logistics and other marketing activities
14.1.18 Explain the role of warehousing/stock handling in logistics

BIL: Essential

EDU:	12	AD
	I	P

Competency 14.2: Evaluate concept of Supply Chain Management (SCM)
Key Indicators:

14.2.1 Identify components of the supply chain
14.2.2 Evaluate how supply chain management reduces order response times, reduces inventory requirements, reduces costs and increases revenues, and reduces cumulative cycle time
14.2.3 Evaluate key success factors
14.2.4 Evaluate role of Electronic Data Interchange (EDI) in supply chain management
14.2.5 Evaluate the role of intranets and extranets in supply chain management
14.2.6 Examine future trends in supply chain management

BIL: Essential

EDU:	12	AD
	P	R

Competency 14.3: Evaluate the shipping process
Key Indicators:
14.3.1 Explain role of shipping
14.3.2 Evaluate ways to ship products
14.3.3 Identify common shipping providers
14.3.4 Compare shipping rates
14.3.5 Compare shipping methods based on size of product(s)
14.3.6 Select best shipping methods
14.3.7 Identify types of packing materials
14.3.8 Identify packing material vendors
14.3.9 Compare costs of packing materials
14.3.10 Identify an electronic information system to track orders

BIL: Essential

EDU:	12	AD
	P	R

Competency 14.4: Evaluate business inventory
Key Indicators:
14.4.1 Evaluate role of inventory control in logistics
14.4.2 Explain concept of ABC analysis
14.4.3 Explain cost considerations in inventory management
14.4.4 Calculate economic order quantity (EOQ)
14.4.5 Calculate reorder point
14.4.6 Calculate average inventory
14.4.7 Explain concept of Just-In-Time (JIT) inventory
14.4.8 Use an online inventory control system to locate and determine the availability of goods within the business
14.4.9 Organize inventory counts
14.4.10 Explain unit inventory control systems
14.4.11 Explain dollar inventory control systems
14.4.12 Evaluate inventory

BIL: Essential

EDU:	12	AD
	P	R

Competency 14.5: Explain legal considerations in distribution
Key Indicators:
14.5.1 Describe illegal distribution activities
14.5.2 Identify laws that govern distribution activities
14.5.3 Explain impact of regulation on distribution activities
14.5.4 Discuss nature of service intermediaries
14.5.5 Explain legal considerations in distribution

BIL: Essential

EDU:	12	AD
	P	R

Competency 14.6: Describe ethical considerations in distribution
Key Indicators:
14.6.1 Discuss reasons that marketers should not manipulate the availability of a product for the purpose of exploitation
14.6.2 Describe ethical issues associated with serving markets with low profit potential
14.6.3 Explain when ethical issues can arise in a distribution channel
14.6.4 Explain ethical implications of the gray market on U. S. businesses
14.6.5 Describe how communication relates to distributions ethics

BIL: Essential

EDU:	12	AD
	P	R

Competency 14.7: Explain the relationship between customer service and distribution
Key Indicators:
14.7.1 Explain how customer service facilitates order processing
14.7.2 Identify actions that customer service can take to facilitate order processing
14.7.3 Describe the role of customer service in following up on orders

BIL: Essential

EDU:	12	AD
	P	R

Competency 14.8: Prepare invoices
Key Indicators:
14.8.1 Identify the components of an invoice
14.8.2 Calculate extensions on an invoice
14.8.3 File invoices

BIL: Essential

EDU:	12	AD
	I	P

Competency 14.9: Use an information system for order fulfillment
Key Indicators:
14.9.1 Explain the role of information systems in creating channel efficiency
14.9.2 Describe how information systems can be used to track lost/late orders
14.9.3 Demonstrate procedures for using an information system for order-fulfillment

BIL: Essential

EDU:	12	AD
	P	R

Competency 14.10: Describe the receiving process
Key Indicators:
14.10.1 Identify the receiving process
14.10.2 Explain the importance of the receiving process to business operations
14.10.3 Explain purpose of the receiving process
14.10.4 Describe receiving activities
14.10.5 Discuss importance of accuracy in performing receiving activities

BIL: Essential

EDU:	12	AD
	I	P

Competency 14.11: Coordinate management of distribution
Key Indicators:
14.11.1 Coordinate distribution with marketing activities
14.11.2 Select channels of distribution
14.11.3 Evaluate channel members

BIL: Essential

EDU:	12	AD
	P	R

Competency 14.12: Explain storage considerations
Key Indicators:
14.12.1 Identify what type of businesses use storage
14.12.2 Explain how storage adds utility to goods
14.12.3 Describe reasons for storing goods
14.12.4 Explain characteristics that are important to consider when deciding how to store goods

BIL: Essential

EDU:	12	AD
	I	P

Competency 14.13: Explain the nature of warehousing
Key Indicators:
14.13.1 Describe types of warehouses and storage facilities
14.13.2 Explain factors that affect the choice of warehouses

BIL: Essential

EDU:	12	AD
	I	P

Competency 14.14: Analyze channel-member relationships
Key Indicators:
14.14.1 Explain the difference between horizontal conflict and vertical conflict
14.14.2 Describe the bases of power within a distribution channel
14.14.3 Analyze channel leadership
14.14.4 Analyze channel conflict
14.14.5 Describe ways to achieve channel cooperation

BIL: Essential

EDU:	12	AD
	P	R

Competency 14.15: Analyze channel strategies
Key Indicators:
14.15.1 Explain types of distribution (e.g., exclusive distribution, intensive distribution, selective distribution)
14.15.2 Identify major channel strategy decisions (e.g., channel selection, level of intensity, use of vertical marketing systems)
14.15.3 Describe factors that indicate a need to change channel strategies
14.15.4 Explain relationship between channel strategy and distribution costs
14.15.5 Discuss distribution intensity as a channel strategy
14.15.6 Explain the use of vertical marketing systems as a channel strategy
14.15.7 Identify factors that affect the choice of channel of distribution
14.15.8 Describe factors that affect selection of distribution channels (e.g., nature of product, market size and location, access to channel members)
14.15.9 Explain procedures for selecting channels of distribution

BIL: Essential

EDU:	12	AD
	P	R

Competency 14.16: Evaluate channel members
Key Indicators:
14.16.1 Describe criteria for evaluating channel members
14.16.2 Explain importance of channel member evaluation
14.16.3 Demonstrate procedures for evaluating channel members

Instructional Unit 15: Customer Relationship Management

BIL: •Essential

EDU:	12	AD
	P	R

Competency 15.1: Analyze basic customer relationship management (CRM) concepts
Key Indicators:

15.1.1 Analyze the reasons and methods to determine what customers want
15.1.2 Explain the role of quality in customer satisfaction
15.1.3 Explain the role of warranties and guarantees in customer satisfaction
15.1.4 Explain the role of website usability in customer satisfaction
15.1.5 Explain the use of CRM software
15.1.6 Explain the link between customer relationships and supply chain management
15.1.7 Explain the importance of all customers to the business
15.1.8 Analyze the relationship between customer satisfaction, loyalty, and value
15.1.9 Describe the link between customer satisfaction, loyalty, retention, profit, market-perceived value, and customer lifetime value
15.1.10 Explain the relationship between service and sales
15.1.11 Explain the concept of a customer relationship focus and its importance to an organization
15.1.12 Describe the concept of a value chain
15.1.13 Explain the importance of using strategic alliances to maximize the value chain

BIL: Essential

EDU:	12	AD
	P	R

Competency 15.2: Manage customer service
Key Indicators:

15.2.1 Encourage employees to project a professional image (e.g., appearance, voice, grammar, word usage, enunciation, nonverbal communication)
15.2.2 Encourage employees to interact with customers and colleagues in a professional manner (e.g., prompt, friendly, courteous, respectful, helpful, knowledgeable, clear)
15.2.3 Establish business protocols and company policies
15.2.4 Communicate company policies to customers
15.2.5 Develop merchandise returns policies
15.2.6 Resolve customer complaints in accordance with customer service policy
15.2.7 Facilitate customer service through the maintenance of key information systems
15.2.8 Monitor follow-through on commitments made to customers (e.g., special orders, delivery specifications, new items)
15.2.9 Monitor follow up on order problems

15.2.10 Explain current enabling technologies in CRM
15.2.11 Compare CRM software packages

BIL: Essential

EDU:	12	AD
	P	R

Competency 15.3: Explain the benefits of customer support (including online)
Key Indicators:
15.3.1 Explain the impact of customer support on customer loyalty
15.3.2 Explain the impact of customer support on returns
15.3.3 Explain how customer support reduces negative word-of-mouth
15.3.4 Explain how customer support systems can increase convenience
15.3.5 Explain how customer support can reduce support costs
15.3.6 Explain ways to use customer support inquiries as part of market research
15.3.7 Explain the 80/20 rule of customer support
15.3.8 Explain the correlation between customer retention and acquisition costs
15.3.9 Create an online information forum

BIL: Essential

EDU:	12	AD
	I	P

Competency 15.4: Analyze customer relationships
Key Indicators:
15.4.1 Explain connection between customer and employee satisfaction
15.4.2 Describe a customer-focused environment
15.4.3 Create a customer communication plan
15.4.4 Develop a customer information system (e.g., tracking systems, databases, registration)
15.4.5 Determine organization readiness to meet customer expectations
15.4.6 Explain advantages and disadvantages of different services based on customer value
15.4.7 Complete a customer focus audit
15.4.8 Explain customer mix and customer pyramids

BIL: Essential

EDU:	12	AD
	I	P

Competency 15.5: Evaluate customer retention
Key Indicators:

15.5.1 Identify customer loyalty segments
15.5.2 Identify customer satisfaction measures
15.5.3 Explain advantages of working with existing customers
15.5.4 Assess customer satisfaction
15.5.5 Assess customer value, lifetime value, and net present value
15.5.6 Assess business share of customers
15.5.7 Use customer-based metrics (e.g., profitability analysis, value analysis, satisfaction analysis, loyalty indicators, revenue per customer)
15.5.8 Analyze customer behavior (e.g., habits, purchasing patterns, needs)
15.5.9 Identify problems and opportunities
15.5.10 Develop loyalty programs
15.5.11 Develop frequency marketing programs
15.5.12 Create a customer management plan
15.5.13 Describe ways companies strive to eliminate gaps in customer satisfaction and expectations, and business performance
15.5.14 Assess company performance relative to customer priorities and competitor performance
15.5.15 Analyze tracking results
15.5.16 Use benchmarking and performance measures to support improvement
15.5.17 Create customer process controls
15.5.18 Compute the cost of a lost customer

Instructional Unit 16: Finance

BIL: Essential

EDU:	12	AD
	P	R

Competency 16.1: Explain the nature and scope of financing
Key Indicators:
16.1.1 Describe the importance of financing to a business
16.1.2 Describe the relationship between financing and marketing
16.1.3 Explain the critical nature of banking relationships
16.1.4 Explain the purposes and importance of obtaining business financing
16.1.5 Describe sources of financing for businesses
16.1.6 Describe electronic financial services
16.1.7 Describe the use of technology in finance

BIL: Essential

EDU:	12	AD
	P	R

Competency 16.2: Explain basic accounting concepts and principles
Key Indicators:
16.2.1 Demonstrate knowledge of basic accounting principles and applications
16.2.2 Explain accounting terminology
16.2.3 Explain financial control procedures
16.2.4 Describe record-keeping procedures for marketing management and research functions/applications
16.2.5 Explain periodic reporting procedures

BIL: Essential

EDU:	12	AD
	P	R

Competency 16.3: Analyze financial performance
Key Indicators:
16.3.1 Interpret balance sheets
16.3.2 Interpret income statements
16.3.3 Perform cash-flow analyses
16.3.4 Prepare break-even analyses

16.3.5 Prepare budgets
16.3.6 Prepare comparative financial statements
16.3.7 Prepare cost and revenue analyses
16.3.8 Prepare forecasts
16.3.9 Interpret change-in-equity statement

BIL: Essential

EDU:	12	AD
	P	R

Competency 16.4: Explain purpose and importance of obtaining business credit
Key Indicators:
16.4.1 Explain reasons that businesses need to obtain credit
16.4.2 Define equity sources and debt sources
16.4.3 Identify sources of credit for businesses
16.4.4 Describe advantages and disadvantages of obtaining credit from each source

BIL: Recommended

EDU:	12	AD
	I	P

Competency 16.5: Identify risks associated with obtaining business credit
Key Indicators:
16.5.1 Identify direct financial costs associated with obtaining credit
16.5.2 Discuss periodic reporting requirements required by lenders
16.5.3 Explain financial covenants and restrictions included in loan agreements by lenders
16.5.4 Discuss the use of subordination agreements in financial covenants
16.5.5 Explain the use of personal guarantees in lending policies
16.5.6 Identify factors that can be negotiated to replace the use of personal guarantees

BIL: Essential

EDU:	12	AD
	I	P

Competency 16.6: Determine financing needed
Key Indicators:
16.6.1 Explain the need for ongoing financing for business operations
16.6.2 Explain how a business is affected by insufficient financing
16.6.3 Describe factors affecting ongoing financing

16.6.4 Identify reasons that additional capital is needed
16.6.5 Determine monies needed for ongoing financing

BIL: Essential

EDU:	12	AD
	I	P

Competency 16.7: Use financial statements to make marketing management and research decisions

Key Indicators:
16.7.1 Calculate profitability ratios from financial statements
16.7.2 Interpret cash-flow analysis statements
16.7.3 Document impact of financial analysis on the strategic planning process
16.7.4 Revise short-term and long-term strategic plans based on financial analyses
16.7.5 Interpret break-even analyses
16.7.6 Evaluate expense accounts
16.7.7 Evaluate accounts receivable
16.7.8 Manage sales accounts

Instructional Unit 17: Marketing and the New Economy

BIL: Essential

EDU:	12	AD
	P	R

Competency 17.1: Describe economic concepts
Key Indicators:

17.1.1 Explain how supply, demand, and price are related
17.1.2 Explain the concept of private enterprise and business ownership
17.1.3 Explain the relationship among risk, competition, and profit
17.1.4 Identify the characteristics of a free enterprise system
17.1.5 Compare/contrast various forms of competition (e.g., pure, monopoly, oligopoly)
17.1.6 Describe the cyclical nature of the economy (e.g., unemployment, recession, inflation, depression, recovery)
17.1.7 Identify the effects of public and private economic activity on the business sector
17.1.8 Describe the relationship between business and government
17.1.9 Describe productivity measures
17.1.10 Describe the impact of global economic changes on the U.S. economy
17.1.11 Discuss the impact of economic change on marketing mix strategies
17.1.12 Explain the impact of global competition
17.1.13 Describe the impact of technology on our economic system

BIL: Essential

EDU:	12	AD
	P	R

Competency 17.2: Describe economic indicators and trends
Key Indicators:

17.2.1 Explain gross national product and gross domestic product
17.2.2 Describe the impact of the national debt
17.2.3 Describe the impact of interest rates
17.2.4 Define the impact of spending (e.g., government, business capital, individual)
17.2.5 Describe the impact of business cycles
17.2.6 Describe the impact of inflation, growth, recession, and unemployment
17.2.7 Describe the impact of the consumer price index
17.2.8 Explain how business practices impact the economy
17.2.9 Explain how to adapt marketing to the new economy (e.g., digitalization, disintermediation, reintermediation, customization, customerization, industry convergence)
17.2.10 Explain how marketing practices impact the economy (e.g., websites, online ads and promotions)

BIL: Essential

EDU:	12	AD
	P	R

Competency 17.3: Explain international trade
Key Indicators:

17.3.1 Describe the nature and importance of international trade
17.3.2 Describe the growth of international trade
17.3.3 Explain the impact of the Internet on international trade
17.3.4 Describe legal issues related to international e-commerce
17.3.5 Explain balance of trade concepts
17.3.6 Describe the effect of currency exchange rates on international trade
17.3.7 Describe the impact of a nation's government policies on international trade
17.3.8 Describe the impact of a nation's political situation on international trade
17.3.9 Describe geographical factors that affect international trade
17.3.10 Explain the impact of a nation's economic condition on international trade
17.3.11 Explain the impact of tariffs
17.3.12 Explain the impact of culture on business practices
17.3.13 Explain the different types of trade agreements
17.3.14 Explain how globalization has affected marketing

Instructional Unit 18: Business Law and Ethics Affecting Marketing

BIL: Essential

EDU:	12	AD
	I	P

Competency 18.1: Evaluate the relationship between law and business
Key Indicators:
18.1.1 Explain the relationship between ethics and the law
18.1.2 Identify the impact civil and criminal laws may have on marketing management and research
18.1.3 Identify the impact laws of various jurisdictions may have on marketing management and research
18.1.4 Demonstrate knowledge of contract law
18.1.5 Describe the components of a legally binding contract

BIL: Essential

EDU:	12	AD
	P	R

Competency 18.2: Evaluate issues related to leadership and marketing managerial ethics
Key Indicators:
18.2.1 Investigate the nature of leadership and marketing managerial ethics
18.2.2 Research the history of leadership and management theory
18.2.3 Analyze current issues in leadership and marketing management ethics
18.2.4 Identify the impact that various employment and social laws may have on leading, managing, and marketing

BIL: Essential

EDU:	12	AD
	P	R

Competency 18.3: Demonstrate ethical business behavior in marketing
Key Indicators:
18.3.1 Discuss current trends in ethics related to technology
18.3.2 Identify various types of ethical and unethical business/marketing practices
18.3.3 Interpret codes of ethics for given businesses
18.3.4 Identify potential consequences of unethical business/marketing practices

18.3.5 Use ethical behavior in dealing with internal/external customers
18.3.6 Explain the relationship between ethics in marketing and the company culture

BIL: Essential

EDU:	12	AD
	P	R

Competency 18.4: Evaluate issues related to employee ethics
Key Indicators:
18.4.1 Discuss current issues in employee ethics
18.4.2 Identify types of ethical/unethical employee behaviors
18.4.3 Identify ethics established by business for marketing management
18.4.4 Identify unethical marketing management behaviors and their consequences
18.4.5 Analyze critical issues related to employment contracts (e.g., confidentiality, non-disclosure, non-competitive)

BIL: Essential

EDU:	12	AD
	P	R

Competency 18.5: Describe intellectual property rights and copyright laws
Key Indicators:
18.5.1 Explain purpose of patent
18.5.2 Explain purpose of copyright
18.5.3 Explain purpose of licenses
18.5.4 Explain rights of the originator
18.5.5 Explain rights of the public
18.5.6 Define confidentiality
18.5.7 Explain legal ownership of proprietary material
18.5.8 Describe stock image/text usage rights
18.5.9 Explain reproduction licensing and residual usage

Instructional Unit 19: Technology for Marketing

BIL: Essential

EDU:	12	AD
	P	R

Competency 19.1: Describe the impact of technology on society
Key Indicators:

19.1.1 Describe how technology (e.g., PCs [personal computers], larger computer systems, infrastructure) impacts people and organizations
19.1.2 Describe the impact of computers on career pathways in business/industry (e.g., elimination and creation of jobs)
19.1.3 Identify security risks and associated safeguards
19.1.4 Describe the impact of computers on access to information and information exchange worldwide
19.1.5 Identify issues and trends affecting computers and information privacy
19.1.6 Identify markets that are most and least impacted by technology

BIL: Essential

EDU:	12	AD
	P	R

Competency 19.2: Describe types of business software
Key Indicators:

19.2.1 Identify key functions of systems software used in marketing applications
19.2.2 Explain widely used software applications (e.g., browsers, word processing, database management, spreadsheet development, Customer Relations Management (CRM) applications, web content development, Interview Management, Statistical Analysis, Business Planning, Marketing Planning)
19.2.3 Identify new and emerging classes of software

BIL: Essential

EDU:	12	AD
	P	R

Competency 19.3: Use technology applications
Key Indicators:

19.3.1 Use word-processing software to create and revise documents
19.3.2 Use database software to create and maintain an electronic database

19.3.3 Use spreadsheet software to create and maintain an electronic spreadsheet
19.3.4 Use basic functions of desktop publishing software to create and revise documents
19.3.5 Use presentation graphics software to prepare, modify, and deliver electronic presentations
19.3.6 Integrate software computer applications
19.3.7 Use e-mail
19.3.8 Use scheduling applications to maintain an electronic schedule
19.3.9 Use teleconferencing to facilitate electronic meetings
19.3.10 Describe business intranet systems and how they can be used to communicate
19.3.11 Use Personal Digital Assistant (PDA) to maintain schedules, read e-mail, and access customer information

BIL: Essential

EDU:	12	AD
	P	R

Competency 19.4: Access the Internet
Key Indicators:
19.4.1 Identify the key characteristics of the Internet
19.4.2 Describe the ownership/administration of the Internet
19.4.3 Explain the relationship between the Internet and the World Wide Web (WWW)
19.4.4 Identify current issues related to the Internet
19.4.5 Identify services and tools offered on the Internet (e.g., file transfer protocol, news lists, e-mail)
19.4.6 Use accepted Internet etiquette (i.e., netiquette)
19.4.7 Identify current uses and applications of the Internet
19.4.8 Abide by company Internet security issues
19.4.9 Identify the components of Internet software
19.4.10 Use browser features
19.4.11 Unpack files using compression software
19.4.12 Apply virus protection techniques

BIL: Essential

EDU:	12	AD
	P	R

Competency 19.5: Utilize Internet services
Key Indicators:
19.5.1 Access business and technical information using the Internet
19.5.2 Identify the specific strengths, weaknesses, and special features of available search engines and portals

19.5.3 Select search engine(s) to use
19.5.4 Select appropriate search procedures and approaches
19.5.5 Locate information using search engine(s) and Boolean logic
19.5.6 Navigate websites using software functions (e.g., forward, back, go to, bookmarks)
19.5.7 Evaluate Internet resources (e.g., accuracy of information)
19.5.8 Access library catalogs on the Internet
19.5.9 Access commercial, government, and education resources
19.5.10 Bookmark web addresses (URLs)
19.5.11 Subscribe to mailing lists
19.5.12 Participate in newsgroups
19.5.13 Retrieve online tools
19.5.14 Explore the multimedia capabilities of the World Wide Web
19.5.15 Use collaboration tools
19.5.16 Participate in online audio and video conferencing
19.5.17 Archive files
19.5.18 Compile a collection of business sites (e.g., finance, investment)
19.5.19 Describe company policies related to Internet usage
19.5.20 Explain firewalls and encryption and their impact on Internet usage
19.5.21 Identify ways to protect privacy online

BIL: Essential

EDU:	12	AD
	P	R

Competency 19.6: Analyze e-commerce concepts
Key Indicators:
19.6.1 Describe the components of e-commerce (e.g., front-end, back-end)
19.6.2 Analyze how e-commerce is similar to, and different from traditional commerce
19.6.3 Discuss the global impact of e-commerce
19.6.4 Analyze the scope and impact of e-commerce and how it relates to business practices
19.6.5 Explain how e-commerce relates to e-business and e-marketing
19.6.6 Describe the impact of wireless e-commerce
19.6.7 Describe the impact of emerging technologies
19.6.8 Explain business-to-business e-commerce
19.6.9 Explain business-to-consumer e-commerce
19.6.10 Explain consumer-to-consumer e-commerce
19.6.11 Analyze the impact of e-commerce on business

BIL: Essential

EDU:	12	AD
	P	R

Competency 19.7: Analyze information from technology sources
Key Indicators:

19.7.1 Use a variety of technology resources to retrieve information
19.7.2 Evaluate the credibility and bias of information sources
19.7.3 Interpret information for use in decision-making
19.7.4 Find/classify retrieved information
19.7.5 Cite sources of all types of data
19.7.6 Use search procedures appropriate to type of information, nature of source, and nature of query
19.7.7 Evaluate the accuracy, relevance, and comprehensiveness of retrieved information
19.7.8 Draw conclusions and make generalizations based on information gathered
19.7.9 Analyze/synthesize information
19.7.10 Analyze the effectiveness of online information resources to support collaborative tasks, research, publications, communications, and increased productivity

BIL: Essential

EDU:	12	AD
	P	R

Competency 19.8: Evaluate policies for managing privacy and ethical issues
Key Indicators:

19.8.1 Identify privacy issues with an organization
19.8.2 Apply appropriate federal and state laws pertaining to privacy
19.8.3 Identify personal information that should not be shared
19.8.4 Explain the risks and dangers of sharing personal information
19.8.5 Discuss basic issues related to responsible use of technology and describe personal consequences of inappropriate use
19.8.6 Explain organization policies for privacy and intellectual property
19.8.7 Demonstrate legal and ethical behaviors when using information technology
19.8.8 Identify/explain property, privacy, access, and accuracy issues pertaining to technology (e.g., impact of these issues on individuals and organizations)
19.8.9 Analyze various technologies to distinguish privacy and ethical issues and problems
19.8.10 Develop organization policy for the legal and ethical use of information

BIL: Essential

EDU:	12	AD
	P	R

Competency 19.9: Assess/explain the technology components of major marketing functions and their interrelationships

Key Indicators:

19.9.1 Identify and explain the major components of marketing technology

19.9.2 Identify ways that evolving technologies affect marketing strategy (e.g., e-commerce and wireless technologies)

19.9.3 Explain the importance of having a technological edge over the competition (e.g., faster to market with new products)

19.9.4 Determine new ways of marketing products using emerging and evolving technologies

19.9.5 Analyze the cost benefit of different technological approaches to marketing (e.g., electronic versus print media)

19.9.6 Examine the advantages and disadvantages of a heavy reliance on technological approaches to marketing

BIL: Essential

EDU:	12	AD
	P	R

Competency 19.10: Explain impact of technology on marketing

Key Indicators:

19.10.1 Describe how technology has made it possible to promote products and sales to greater geographic areas

19.10.2 Describe how technology has allowed marketing departments to collect fuller and richer information about markets, customers, prospects, and competitors

19.10.3 Describe how technology has allowed companies to facilitate and speed up internal communications among their employees.

19.10.4 Explain how technology has allowed better two-way communication with customers and prospects and more efficient transactions

19.10.5 Describe how companies now use technology to advertise (e.g., ads, coupons, samples, information)

19.10.6 Explain why companies monitor their websites for visits (e.g., develop a database, customize ads to the type of visitors to their site)

19.10.7 Explain how the Internet can improve purchasing, recruiting, training and internal and external communications

19.10.8 Explain how technology can improve logistics and operations for substantial cost savings (e.g., more accurate and faster way to send and receive information, orders, transactions, payments)

Instructional Unit 20: Writing for Marketing

BIL: Essential

EDU:	12	AD
	P	R

Competency 20.1: Assess report-writing requirements
Key Indicators:

20.1.1 Define/prioritize communication needs
20.1.2 Resolve conflicting requirements
20.1.3 Specify project objectives
20.1.4 Determine the size and specifics of the work to be completed
20.1.5 Estimate time, materials, and capabilities needed to complete assignment
20.1.6 Identify criteria for successful completion of project
20.1.7 Evaluate strengths, weaknesses, opportunities, and threats (SWOT) of completed project

BIL: Essential

EDU:	12	AD
	P	R

Competency 20.2: Write reports
Key Indicators:

20.2.1 Determine audience
20.2.2 Access needed information using standard references and sources
20.2.3 Identify type of report needed
20.2.4 Compile relevant data
20.2.5 Organize data into charts and graphs
20.2.6 Analyze data
20.2.7 Draw conclusions from data analysis
20.2.8 Outline report
20.2.9 Draft report
20.2.10 Edit report (e.g., check spelling, grammar, punctuation, sentence structure, accuracy of content)
20.2.11 Review report with peers
20.2.12 Revise report as needed based on peer feedback
20.2.13 Proofread revised report
20.2.14 Present reports

BIL: Essential

EDU:	12	AD
	P	R

Competency 20.3: Perform writing to sell
Key Indicators:

20.3.1 Identify key sales words
20.3.2 Demonstrate effective writing for the Internet
20.3.3 Identify writing strategies for direct marketing
20.3.4 Write a sales letter
20.3.5 Respond to customer inquiries
20.3.6 Demonstrate effective copywriting techniques with words that sell
20.3.7 Write articles for an e-zine
20.3.8 Write product descriptions
20.3.9 Identify features and benefits of a product or service

Instructional Unit 21: Knowledge-Management

BIL: Recommended

EDU:	12	AD
	I	I

Competency 21.1: Explore knowledge-management
Key Indicators:
21.1.1 Explain why knowledge is considered most important asset for organizations
21.1.2 Determine the difference between explicit and tacit knowledge and why distinction is important in knowledge-management
21.1.3 Identify drivers for organizations to effectively manage knowledge
21.1.4 State reasons to implement knowledge-management
21.1.5 Recognize barriers to knowledge-management
21.1.6 Examine the financial potential of knowledge-management for businesses
21.1.7 Explain the role knowledge workers and the relationship to knowledge-management
21.1.8 Examine the core concepts of learning organization

BIL: Recommended

EDU:	12	AD
	I	I

Competency 21.2: Analyze importance of capture and transfer of strategic knowledge
Key Indicators:
21.2.1 Identify factors that lead to loss of organizational knowledge
21.2.2 Identify ways of preventing loss of knowledge
21.2.3 Identify what knowledge is being lost in organization
21.2.4 Determine the consequences of knowledge loss
21.2.5 Find solutions to knowledge loss
21.2.6 Choose various approaches in transferring strategic knowledge

BIL: Recommended

EDU:	12	AD
	I	I

Competency 21.3: Analyze organizational culture and the role of knowledge-management

Key Indicators:

21.3.1 Determine how organization acquires culture
21.3.2 Explain culture as tactic knowledge
21.3.3 Demonstrate importance of organization culture and its role in implementing knowledge-management

BIL: Recommended

EDU:	12	AD
	I	I

Competency 21.4: Determine barriers that affect knowledge-management implementation

Key Indicators:

21.4.1 Identify cultural assumptions that derail knowledge-management approach
21.4.2 Identify conditions that create favorable acceptance to knowledge-management approach
21.4.3 Create new values (rewards/recognition) that support knowledge sharing
21.4.4 Use the skills of change agent in implementing knowledge-management

BIL: Recommended

EDU:	12	AD
	I	I

Competency 21.5: Evaluate various knowledge-management measurement approaches

Key Indicators:

21.5.1 Create balanced scorecard performance measurement system
21.5.2 Determine the four perspectives of balanced scorecard measurement system
21.5.3 Evaluate strengths and weaknesses of each perspective of balanced scorecard measurement system
21.5.4 Survey employees' opinions as a knowledge-management measure

BIL: Recommended

EDU:	12	AD
	I	I

Competency 21.6: Measure intellectual capital
Key Indicators:
21.6.1 Explain intellectual capital
21.6.2 Analyze various approaches for measuring intellectual capital
21.6.3 Use the intangible assets monitor method for measuring intellectual assets (human competence, external structure, internal structure)

Appendix A

Review Panels

Ohio Business TCP
Futuring Panel Participants

Nichole Nares, Human Resource Consultant, Nationwide Mutual Insurance Company, Columbus

Roger Campbell, Training Manager, Worthington Industries, Columbus

Jane Cape, Dean, Business Technologies, Clark State Community College, Springfield

Julie Danner, Manager, Training and Development, Ross Products Division, Columbus

Chris Hamm, Financial Consultant, First Merit Securities, Medina

Christina Hutchings, Manager, Financial Reporting, Lane Bryant, Reynoldsburg

Jeff Hutchins, Founder, VITAC (retired), Canonsburg, PA

John Martin, President, Optimum System Products, Inc., Columbus

James Nemcek, CEO, Alearna, Columbus

Karen Nemcek, E-Learning Consultant, Alearna, Columbus

Linda Shimp, Human Resources Manager, YSK Corporation, Chillicothe

Roy Smoot, President & CEO, Columbus Speech and Hearing, Columbus

Cheryl Sparks, Human Resources Director; Vorys, Sater, Seymour and Pease LLP; Columbus

Julie Talks, Accounting/Office Manager, Optimum Systems, Columbus

Robert Thomas, Case Manager, Supervisor, Franklin County Board of MR/DD—Case Management, Columbus

Judith Wright, Corporate Secretary, Karlsberger Companies, Columbus

Kym Yahn, Workforce Development Manager, Dayton Area Chamber of Commerce, Dayton

Joseph Zielinski, Certified Business Consultant, EISC, Inc., Toledo

Ohio Marketing Management and Research TCP Futuring Panel Participants

Mike Anderson, Manager, Marketing Research, The Longaberger Company, Newark

Norman Blanchard, Economic Development Director, Cambridge Guernsey County Community Improvement Corporation, Cambridge

Jim Gleason, President, MarkEd Resource Center, Columbus

John Riester, President/Owner, Discovery Works, Inc., Cincinnati

Ohio Marketing Management and Research TCP Business and Professional Panel Participants

Mike Anderson, Manager, Marketing Research, The Longaberger Company, Newark

Kevin M. Feldt, Marketing Director/Consultant, Arco Sheet Metal Manufacturing, Bedford Heights

Mary Beth Harper, President, Harper & Co. Communications, Kent

Andy Irick, Vice President, Retail Services, Security National Bank, Springfield

Beth Osteen, Vice President, Research and Development, Marketing Education Resource Center, Inc., Columbus

Curtis Pratt, Lead Marketing Analyst, GatesMcDonald, Hilliard

Carolyn Rice, Marketing Consultant, Rice & Associates, Dayton

John Riester, Owner/President, Discovery Works, Inc., Cincinnati

Ohio Marketing Management and Research TCP Educators Panel Participants

Teresa R. Campbell, Instructor, Clark State Community College, Springfield

Susan Everhart, Marketing Instructor, GlenOak High School / Plain Local Schools, Canton

Jean Getz, Marketing Instructor, Beachwood City Schools, Beachwood

Nancy Henz, Marketing Instructor, Warren County Career Center, Lebanon

Mike Kolacz, Chair, Marketing & Management Technologies, Owens Community College, Perrysburg

Kathleen Lower, E-Commerce Marketing Teacher, GlenOak High School / Plain Local Schools, Canton

Gregg Marino, Marketing Instructor, W. E. Stebbins High School, Riverside

John Marino, Associate Professor, Kent State University – Trumbull Campus, Warren

Paula Saunders, Chair, Department of Marketing, Raj Soin College of Business, Wright State University, Dayton

Julie Woeste, Marketing Instructor, Butler Technology and Career Development Schools, Edgewood High School, Trenton

Jim Wood, Business Management / Marketing Program Chair, Cincinnati State Technical & Community College, Cincinnati

Ohio Marketing Management and Research TCP Stakeholders Panel Participants

Mike Anderson, Marketing Research, The Longaberger Company, Newark

Teresa Campbell, Instructor, Clark State Community College, Springfield

Carolyn Rice, Marketing Consultant, Rice and Associates, Dayton

Julie Woeste, Marketing Instructor, Butler Technology and Career Development Schools, Edgewood High School, Trenton

Jim Wood, Business Management/Marketing Program Chair, Cincinnati Technical and Community College, Cincinnati

Appendix B

College Tech Prep Pathway Template

(High School)

(Career Center)

(Community College)

College Tech Prep Program

(School Year)

9th GRADE	CREDIT	10th GRADE	CREDIT	11th GRADE	CREDIT	12th GRADE	CREDIT

Recommended Prerequisites for Grade 11 of Tech Prep	Recommended for College Portion of Tech Prep

Junior Year Tech Center/College Technical Courses		Senior Year Tech Center/College Technical Courses	
*Technical Subjects	On-transcript _____ College Credits	*Technical Subjects	_____ College Credits

Articulated Credits: -_____ Community College

This template is used to facilitate Ohio College Tech Prep Pathways and is submitted by the Ohio College Tech Prep Consortium with the application.
Revised 6/20/03

DEGREE: ASSOCIATE OF _____

_____ - College Tech Prep _____

(Career Center) (Name of College Tech Prep Program)

Term Taken	First Term	Pre-requisite	Co-requisite	Quarter Credit Hours	University Pathway Equivalent	Completed as Tech Prep Component
Term Taken	**Second Term**	**Pre-requisite**	**Co-requisite**			
Term Taken	**Third Term**	**Pre-requisite**	**Co-requisite**			

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DEGREE: ASSOCIATE OF _____

_____ - College Tech Prep _____
(Career Center) (Name of College Tech Prep Program)

Term Taken	Fourth Term	Pre-requisite	Co-requisite	Quarter Credit Hours	University Pathway Equivalent	Completed as Tech Prep Component

Term Taken	Fifth Term	Pre-requisite	Co-requisite			

Term Taken	Sixth Term	Pre-requisite	Co-requisite	Quarter Credit Hours	University Pathway Equivalent	Completed as Tech Prep Component

_____ Total Quarter Credit Hours

Revised 6/20/03

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Appendix C

Professional Associations and Certifications

Marketing Management and Research

Professional Associations and Certifications

Associations

- Advertising Research Foundation
- American Marketing Association
- Business Marketing Association
- Direct Marketing Association
- eMarketing Association
- Marketing Research Association
- Public Relations Society of America
- Qualitative Research Consultants Association
- Sales and Marketing Executives International
- Society for Marketing Professional Services
- The Institute of Certified Professional Managers

Certifications

- Certified Associate Manager
- Certified Competitive Intelligence Analyst
- Certified eMarketing Associate
- Certified Marketing Executive
- Certified Professional Manager
- Certified Sales Executive
- Customer Service Certification

Appendix D

Ohio Tech Prep Consortia

Ohio Tech Prep Consortia

Website: www.regents.state.oh.us/techprep

PHASE I (formed 1992)
1. Heart of Ohio
2. Miami Valley
3. North Central
4. North Coast
5. Partners of Marion
6. Washington-Morgan-Meigs

PHASE II (formed 1993)
7. Akron Area
8. Columbiana County
9. Kent
10. Lakeland
11. Ohio South
12. Stark County
13. Upper Miami Valley

PHASE III (formed 1994)
14. Clark State
15. Greater Cincinnati
16. Eastern Ohio Valley
17. Lorain County
18. Mid-East Ohio
19. West Central
20. Workforce Development Council

PHASE IV (formed 1995)
21. Ohio State - Agricultural Technical Institute (with programs at locations throughout Ohio)
22. Mahoning Area
23. Northwest Ohio
24. Tuscarawas Valley

PHASE V (formed 1996)
25. East Central Ohio
26. Ohio Valley
27. Maumee Valley
28. Southeast

Note: Consortia 8, 9 and 24 merged with headquarters at 09

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